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ABSTRACT

The Oregon component of a four-state project working towards the design of a staff development and school improvement support system is described. Information was gathered from various sources regarding the number and kinds of continued professional development activities engaged in by schools throughout the state. These data were fashioned into a set of policy and procedural recommendations that established a broad framework for inservice teacher education in Oregon. Six recommendations are included in the report. (Author/LH)

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Staff Development of Educational Personnel
THE OREGON PLAN
A Profession-Wide Support System

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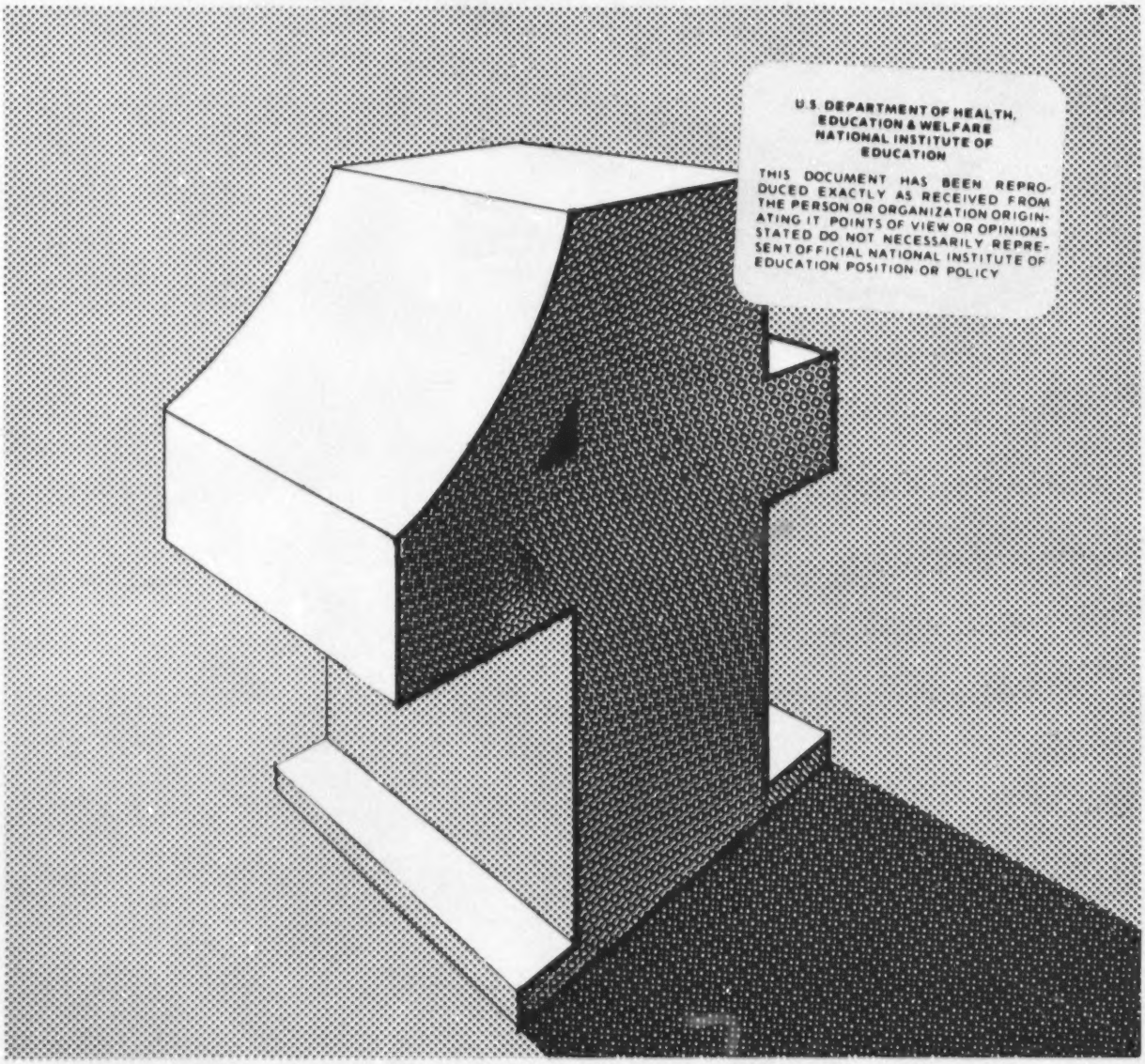
The Four State Project



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Staff Development of Educational Personnel
THE OREGON PLAN
A Profession-Wide Support System

Developed as Part of
THE FOUR STATE PROJECT

August 1979

Prepared in accordance with Contract Number 300-78-0066 between the Department of Health, Education, and Welfare (through the Teacher Corps Program of the U.S. Office of Education) and the West Virginia Department of Education.

MAR 1 9 1980

ABSTRACT

THE 4-STATE PROJECT IN OREGON

PROJECTIONS FOR A PROFESSION-WIDE, COOPERATIVE SYSTEM OF SUPPORT FOR SCHOOLS AND SCHOOL PERSONNEL

Background Information

Oregon has been working toward the design of a staff development/ school improvement support system for several years. Our efforts started three years ago with a study of inservice education by the deans and directors of teacher education programs within the state. As this study progressed, it broadened to a profession-wide study group and its focus expanded to include the continued professional development (CPD) of school personnel throughout their professional lives.

Information collected through research sponsored by the study group focused on the number and kind of CPD activities engaged in by school personnel during the course of a calendar year, who planned and provided these activities, who paid for the activities, the value gained through the activities, etc. Information also was collected on the statutory and administrative rules effecting the professional development of school personnel in Oregon, the resources set aside within districts to support CPD activities, and the attention paid CPD activities within contracts negotiated by teacher associations.

Using these data as a base from which to proceed, the study group fashioned a set of policy and procedural recommendations that established a broad framework for the continued professional development of school personnel in Oregon. These are attached as Exhibit A. All segments of the education community were represented on the study group, including the Oregon School Boards Association, the Oregon Education Association, and the Oregon Federation of Teachers.

The recommendations put forth by the study group have now been approved by all of the institutions, agencies and professional associations represented on the group, and an INTERAGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL has been established. The COUNCIL is to serve as a forum for the discussion of matters pertaining to the professional development of school personnel in Oregon, and is to advise all institutions and agencies who in any way are responsible for improving the quality of schooling about matters pertaining to the improvement of school personnel.

Contributions Of The 4-State Project

The 4-State Project in Oregon was used to extend the work accomplished by the profession-wide study group. Specifically, the project was used to translate the policy and procedural recommendations prepared by the study group into a design for an operational support system for schools and school personnel. The support system as a whole is composed of three interdependent sub-systems, each having to a large extent its own governance structure, management procedures and funding sources. The focus of each of the sub-systems is reflected in its title:

- School Improvement/Staff Development;
- Advanced Study/Certification;
- Collegial Exchange/Professionalization.

The State Department of Education and Education Service Districts are central to the operation of the SCHOOL IMPROVEMENT/STAFF DEVELOPMENT sub-system; institutions of higher education and the Oregon Teacher Standards and Practices Commission are central to the operation of the ADVANCED STUDY/CERTIFICATION sub-system; and professional associations are central to the operation of the COLLEGIAL EXCHANGE/PROFESSIONALIZATION sub-system.

The INTERAGENCY COUNCIL is responsible for seeing that these three support systems are complementary, and in combination provide the kind of support services needed by schools and school personnel to continuously improve the quality of schooling in Oregon.

Central to the funding and operation of the proposed support system is the concept of regionally organized "educational cooperatives" or "educational consortia." These are seen as an organizational arrangement that is entered into voluntarily to create the necessary pool of resources and expertise needed to effectively support schools in their staff development and program improvement efforts. Consortia do not have a statutory base in Oregon. As presently conceived they will draw together the resources of local districts, education service districts, institutions of higher education, educational R and D agencies, and the State Department of Education.

Resources made available through the 4-State Project have been directed most intensely to the design and testing of the school IMPROVEMENT/STAFF DEVELOPMENT support system, and the implementation of this system through regional consortia. By the end of the project (May, 1979) eleven school districts working within the framework of three regional consortia will have prepared program improvement/staff development plans around identified program improvement needs, and the plans will have been used to test the feasibility of both the planning process and projections for implementation. Each feasibility test is to contain data as to costs and benefits for each institution and agency that has been associated with the planning process.

The Oregon Experience As A Test Of The
4-State "Prototype" For Statewide Planning

The proposed support system for schools and school personnel in Oregon evolved as the "prototype" for statewide planning was evolving within the project as a whole. As both now stand how do they compare? Have the elements identified in the prototype been addressed by the proposed support system in Oregon? If so, how? If not, why not?

The paragraphs that follow describe the match between the prototype and the Oregon plan. Many of the specifics around these topics have not been worked out in detail, but all have been discussed. Where formal decisions have not as yet been reached the policy recommendations of the profession-wide study group and the structure of the proposed support system give direction to what they might be.

Governance

[Discussed; recognized as essential; some design decisions made; one structure established]

Trying to picture the governance structure for any statewide support system for schools and school personnel is difficult, especially when the system is essentially cooperative in nature. Generally speaking, however, those participating in the 4-State Project anticipate several levels of governance operating in a "loosely-coupled" fashion. In addition to the governance structure each participating institution and agency has of its own, new structures will need to be established to accommodate the various organizational levels operating within the support system as a whole. A governance structure will have to be set up, for example, for each regional cooperative. The most general governance structures -- more accurately, monitoring and advisory mechanisms -- are the INTERAGENCY COUNCIL for the Continued Professional Development of School Personnel (established) and a proposed ADVISORY COMMITTEE TO THE SUPERINTENDENT OF PUBLIC INSTRUCTION ON INSTRUCTIONAL IMPROVEMENT.

The extent to which, and the manner in which, these various governing bodies might interact is simply beyond our ability to foresee at this time.

Needs Assessment

[Discussed; recognized as essential; no design decisions made]

Participants in the 4-State Project anticipate that each level of organization within the state plan warranting a governance structure will have a "needs assessment" and "priority assignment" function to perform. Also, each will have access to different information pertaining to needs, and may interpret need information quite idiosyncratically. Some exchange of information about needs will flow across the various levels of the support system as a whole, but what information and how specifically it will be transferred, for example, from local or service

districts to the State Department, and vice versa, is as yet without specification.

Outcomes To Be Achieved

[Discussed; recognized as essential; design decisions reached]

The support system has two primary aims. First, it is to make accessable to schools in all parts of the state, regardless of location or size, the resources and expertise needed to implement locally desired or state and federal mandated school improvement/staff development efforts. Second, it is to make full and efficient use of all resources available within the educational community in Oregon. The attainment of learning outcomes for children and youth desired by each community in the state is the overarching goal of the support system. Enabling goals include instructional and support programs in schools that are cost effective in facilitating desired learning outcomes, and school personnel who are able to implement these programs.

Service Delivery Systems

[Discussed; recognized as essential; design decisions reached]

These have been described previously (see contributions of the 4-State Project, p 2).

Rewards/Incentives

[Discussed; recognized as essential; Task Force established to prepare recommendations]

Throughout the deliberations of the profession-wide study group, and throughout the 4-State Project, the assumption has been made that the primary motive operating on the part of all concerned was an overriding desire to create the best possible learning opportunities for children and youth. Our assumption has been that this motive is central to the work of state agency personnel, teacher educators and staff of professional associations as well as teachers, administrators and board members of school systems. If this assumption were absent the progress made thus far would not have been possible. If this assumption were found to be false in future the likelihood of being able to establish a support system of the kind proposed would be beyond reach.

While the assumption of commitment to the well being of children and youth, and to strengthening school programs and school faculties as means to this end, have played a central role in the development of the proposed support system it has been recognized all along that more tangible incentive and reward structures will be needed as the support system is implemented. The only incentive of this kind that has been dealt with at all systematically by either study group or persons involved in the 4-State Project has been the matter of funding for program improvement/staff development efforts. The study group

recommended that funding guidelines be established that reflect the principle of "costs assumed according to interests served." A task force established by the Oregon Educational Coordinating Commission to develop these guidelines is in the process of preparing its recommendations.

Evaluation

[Discussed; recognized as essential; no design decisions made]

A design to determine the costs and benefits that accompany the implementation of the proposed support system has not been established. Studies have been conducted as part of the 4-State Project to determine the feasibility of regionally organized educational cooperatives effectively supporting school improvement/staff development efforts at the local level, and proposed funding through the State Department for SI/SD efforts in the coming biennium will require a strong evaluation component, but an overall plan of evaluation has been delayed until the outlines of the support system are more firmly in place. If and when the State moves to formally adopt the proposed system, and initiate its implementation, such a design will be developed. Preliminary discussions of such a design have pointed to the importance (and the difficulty) of looking to improved student learning as one measure of benefit. The implementation of the new Standards for Elementary and Secondary Schools in Oregon, however, should make feasible the collection of this kind of data.

Funding

[Discussed; recognized as essential; no design decisions made]

The major steps that have been taken thus far with respect to funding the proposed support system have been described in the discussion of rewards/incentives (see above).

Conclusions Reached As A Result Of Oregon's Planning Effort That May Be Helpful To Other States

1. Agreement as to definitions and terminology that pertain to the continued professional development of school personnel must be reached before progress in planning can be made.

2. The extent to which the concept of school improvement, as defined through either the improvement of instructional programs or the improvement of student learning, is to be linked with the concepts of staff development and inservice education.

3. Statewide planning for staff development/inservice must recognize and take advantage of the variety of forms which the continued professional development of school personnel can take, and the variety of avenues through which it may be pursued.

4. When undertaking statewide planning that bears upon the continued professional development of school personnel, agreement has to be reached on the criteria against which staff development/inservice programs are to be judged effective.

5. Care needs to be taken in defining what is meant by a "statewide plan" for staff development. Each state, because of its history and organization, probably will differ in the meaning it wishes to assign to "statewide planning."

6. To be effective any "statewide plan" bearing upon the continued professional development of school personnel, regardless of its focus, must be able to serve an essentially endless variety of school personnel in an essentially endless variety of school settings, and do so in a manner that assigns value to this variety.

7. To be effective any statewide plan that bears upon the continued professional development of school personnel must have the endorsement of the school personnel and the school boards it is to serve. For all intents and purposes this means that teachers, specialists, administrators and school board representatives will need to be involved in developing the plan.

8. To be politically acceptable any planning at the state level in this day and age must not add appreciably to the cost of public education, or to the governmental bureaucracy surrounding education.

9. To be politically acceptable any planning at the state level in this day and age must be accompanied with an evaluation plan that will secure evidence as to both costs and benefits upon implementation.

EXHIBIT A

POLICY RECOMMENDATIONS OF THE PROFESSION-WIDE STUDY GROUP ON THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL*

POLICY RECOMMENDATION #1: Encourage each local district to establish and operate, in consultation with its personnel, a staff development program that is responsive to student, staff, district and state needs.

POLICY RECOMMENDATION #2: Identify, catalogue, and cause to be developed when lacking, the instructional resources and expertise needed by districts to plan and operate staff development programs, organize these resources to make them available to districts, and inform districts about how they can gain access to them.

POLICY RECOMMENDATION #3: Obtain the information needed to design effective and cost-efficient local staff development programs, and a statewide system of support for these programs.

POLICY RECOMMENDATION #4: Improve the quality and increase the flexibility of programs leading to the STANDARD TEACHING Certificate, SPECIALIST Certificates and ADMINISTRATIVE Certificates for school personnel.

POLICY RECOMMENDATION #5: Develop guidelines for funding professional development activities for school personnel that reflect the principle of costs assumed according to interests served.

POLICY RECOMMENDATION #6: Establish the present profession-wide study group as an AD HOC INTERAGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL that will (a) continue as a forum for the discussion of matters pertaining to the professional development of school personnel in Oregon; (b) advise the Oregon Board of Education, the Oregon Board of Higher Education, the Teacher Standards and Practices Commission, the Oregon Educational Coordinating Commission and the independent colleges and universities that prepare teachers in matters pertaining to the continued professional development of school personnel; and (c) help coordinate the efforts of the institutions and agencies that share responsibility for the quality of schools and school personnel within the state. The COUNCIL, so long as it exists, will submit biennially to each constituent group a summary of its activities and the progress that is being made in implementing the above recommendations.

* Excerpted from the summary report of the study group entitled: Getting More From Our Schools: Policy and Procedural Recommendations for the Continued Professional Development of School Personnel in Oregon. June, 1978.

FINAL REPORT

THE 4-STATE PROJECT IN OREGON

PROJECTIONS FOR A PROFESSION-WIDE, COOPERATIVE SYSTEM OF SUPPORT FOR SCHOOLS AND SCHOOL PERSONNEL

Prepared By

The Inservice Steering Committee
Oregon Department of Education

Reviewed and approved by the Inter-Agency Council for the Continued Professional Development of School Personnel

July 12, 1979

August 16, 1979

TO WHOM IT MAY CONCERN:

The support system for the Continued Professional Development of School Personnel in Oregon outlined in this report represents the culmination of over three years of work by representatives from all facets of the education community in Oregon. Two and one-half years were spent in collecting information, clarifying concepts, and forging policy recommendations. The past year was spent in designing a support system that reflects the agreements reached in the earlier work.

To my knowledge, this effort on the part of representatives from all facets of the education community in a state working together to find solutions to the issues involved in the continued professional development of school personnel is unique. It has been an arduous, and an informative, and constructive undertaking. What has been proposed by way of a support system does not completely satisfy any of the participants that have been a part of the formative process, and is sure to be modified on the basis of experience. The fact that all participating organizations, agencies, and service providers have remained involved in the process and that their representatives have given approval to what is described here, attests to the success of the efforts thus far.

It is the view of all members of the Inter-Agency Council that the framework described in this report represents an unusually promising point of departure. Organizations, agencies, service providers, and other interest groups have new roles to play and new responsibilities to assume. By joining collectively to serve this long neglected aspect of education, and by continuing the dialogue with one-another that has been started, everyone in education -- especially the children and youth served by our schools -- should be the better for it.

Respectfully,

Marshall Watkins

Marshall Watkins
Assistant Superintendent
Instructional Services
Clackamas County Education Service District

Chairperson, Inter-Agency Council
for the Continued Professional
Development of School Personnel

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ACKNOWLEDGMENTS

The 4-State Project in Oregon involved the efforts of many people in many ways. Representatives from the various programs within the State Department of Education served as an "internal" Steering Committee to the project, and members of the Inter-Agency Council for the Continued Professional Development of School Personnel served in an external review and advisory role. Members of the two groups are listed on the back of this page. The time, energy and sound advice each provided during the course of the project are deeply appreciated.

In addition to the two advisory groups teachers and administrators from eleven school districts, three education service districts and three institutions of higher education were involved in carrying out three separate studies on the feasibility of the proposed support system for schools and school personnel. The interest and professional commitment of these persons, as well as the willingness of the State Department to provide funds from sources other than the 4-State Project to support two of the studies, made this important aspect of the project possible.

Others who contributed to the project in important ways include the superintendents of the education service districts in Oregon who twice listened to the ideas emerging from the project and twice supported the emerging role of the education service districts in these ideas; Drs. Betty Fish and Lee Wells from the State Department who served with Don Egge and Del Schalock as a Coordinating Committee for the project; Ms. Joan Shaughnessy, Ms. Kathleen Stephenson and Ms. Cynthia Yee from the Teaching Research Division who carried out the data collection and analysis tasks completed as part of the project; Ms. Jan Steger from the Teaching Research Division and Ms. Rosie Smith from the State Department who served as secretaries to the project; Dr. Verne Duncan, Superintendent of Public Instruction, who had the foresight to join with other chief state school officers in drafting the original proposal for the project; and our colleagues from Michigan, New York and West Virginia who collectively helped make the project a productive and rewarding experience for all concerned.

Our heartfelt thanks to all.

Don Egge, Chairperson
Inservice Steering Committee
Oregon Department of Education

Del Schalock, Staff person to the project
Oregon State System of Higher Education

Members Of The State Department Steering Committee

Les Adkins, Student Services
Carol Clanfield, Legal and Personnel Services
Dave Curry, Secondary Administration and School Standardization
Don Egge, Associate Superintendent, Instructional Services Division [Chairperson]
Mary Ann Evan, Special Education
Betty Fish, Center for Program Coordination
Jim Hargis, Center for Program Coordination
George Katagiri, Center for Program Coordination
Don Kipp, Legal and Personnel Services
Sharon Martin, Career and Vocational Education
Frank Mazzio, Language Arts
Don Miller, Legal and Personnel Services, Small Schools
Del Schalock, Teaching Research, OSSHE [Staff person to the Committee]
Ray Talbert, Center for Program Coordination
Lee Wells, School Standardization

Present Members of the Inter-Agency Council for the Continued Professional Development Of School Personnel*

Roger Auerbach, Oregon Federation of Teachers
Bruce Clere, Oregon Education Association
Bill DeBoard, Teacher Standards and Practices Commission
Don Egge, Oregon State Department of Education
Dick Hersh, Oregon's Public Colleges That Prepare Teachers
Shirley Kalkhoven, Oregon School Boards Association
Terry Lindquist, Confederation of Oregon School Administrators
Paul Magnusson, Oregon's Private Colleges That Prepare Teachers
Vern Rempel, Chancellor's Office, Oregon State System of Higher Education
Elinore Rogers, Oregon Educational Coordinating Commission
Del Schalock, Teaching Research Division, OSSHE, [Staff person to the Council]
Marshall Watkins, Education Service Districts

* Yet to be appointed are four teachers, an administrator with responsibilities for personnel development and a representative from the community colleges.

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Exhibit C. Roles and Responsibilities of Participants in the Staff Development/School Improvement Support System

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SYNOPSIS

THE 4-STATE PROJECT IN OREGON

PROJECTIONS FOR A PROFESSION-WIDE, COOPERATIVE SYSTEM OF SUPPORT FOR SCHOOLS AND SCHOOL PERSONNEL

Background Information

Oregon has been working toward the design of a staff development/ school improvement support system for several years. Efforts started three years ago with a study of inservice education by the deans and directors of teacher education programs within the state. As this study progressed, it broadened to a profession-wide study group and its focus expanded to include the continued professional development (CPD) of school personnel throughout their professional lives.

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Using these data as a base from which to proceed, the study group fashioned a set of policy and procedural recommendations that established a broad framework for the continued professional development of school personnel in Oregon. With the exception of the community colleges, all segments of the education community were represented on the study group, including private colleges and universities, local school boards, and education service districts.

The recommendations put forth by the study group have been approved by all of the institutions, agencies and professional associations represented on the group, and an INTERAGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL has been established. The COUNCIL is to serve as a forum for the discussion of matters pertaining to the professional development of school personnel in Oregon, and is to advise all institutions and agencies who in any way are responsible for improving the quality of schooling about matters pertaining to the improvement of school personnel.

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Resources made available through the 4-State Project have been directed most intensely to the design and testing of the school IMPROVEMENT/STAFF DEVELOPMENT support system, and the implementation of this system through regional consortia. Three independent tests of the feasibility of the proposed support system were carried out. Eleven school districts working within the framework of three regional consortia prepared program improvement/staff development plans around identified program improvement needs. These plans were used to test the feasibility of both the planning process and projections for implementation. Each feasibility test included data on the costs and benefits accruing to each institution and agency involved in the planning process.

THE 4-STATE PROJECT

In May, 1978, with the aid of funds from the U. S. Office of Education, four states joined together to study the matter of "...improving student achievement through staff development." The project had two purposes. First, each of the four states was to develop a "...specific statewide system for establishing comprehensive staff development programs ... as a demonstration model." Second, the four states cooperatively were to establish from their collective experience a "...prototype model(s) for developing statewide staff development systems ... for use on a national basis." A list of the elements to be reflected in each state's plan for staff development is attached as Exhibit A.

The four states taking part in the project were Michigan, New York, Oregon and West Virginia. The project extended over a twelve month period, May 22, 1978 through May 21, 1979.

Purposes

At the time the project was received a profession-wide study group that had been working over a period of two and a half years had just submitted its recommendations on the continued professional development of school personnel in Oregon. These recommendations were broad and general in nature, but they provided a sound foundation on which the 4-State Project could build. In addition the work of the study group had provided much needed clarity with respect to role responsibilities within the state for the continued professional development of school personnel, and the concepts and definitions needed to deal effectively with this critical aspect of education. The work of the study group has been reported in three documents:

1. Getting More From Our Schools: Policy and Procedural Recommendations for the Continued Professional Development of School Personnel in Oregon;

2. A Summary of Findings From Research on the Continued Professional Development of School Personnel in Oregon: A Document Supporting Policy and Procedural Recommendations; and

3. A Framework for Viewing the Continued Professional Development of School Personnel.

Using the work of the study group as a foundation, the resources made available through the 4-State Project were able to be used to design and test in a preliminary way a support system for school personnel that reflects the characteristics recommended by the study group. Formal institutional and agency approval still needs to be obtained for the system that is being proposed, but current plans call for this to be done during the coming year. In keeping with the spirit of the profession-wide study group the proposed support system is intended to be cooperative in nature, drawing upon the resources and expertise of all within the educational community.

Structure And Operation

The primary work group for the project was the Inservice Steering Committee within the Oregon Department of Education. This was in keeping with the purpose of the project and the award of the project to the State Department. The recently established Inter-Agency Council for the Continued Professional Development of School Personnel served as a broadly constituted review and advisory body to the project. Dr. Donald Egge, Associate Superintendent and for the Instructional Services Division within the Department served as Chairman of the Inservice Committee. Dr. Del Schalock, Research Professor in the Teaching Research Division of the Oregon State System of Higher Education, served as staff to the project.

Procedurally the project followed practices established by the profession-wide study group. Tentative design proposals were submitted to the Steering Committee for review and refinement, and from the Committee's critiques clarity of issues and design requirements gradually emerged. Conceptual clarification and the sharpening of definitions were companion benefits. This process occurred repeatedly throughout the project, with the Steering Committee meeting eight times during the course of 12 months.

At critical points in the evolution of the project the emerging design for the support system was taken to external groups for review. Three such reviews were held by the Inter-Agency Council, two by the superintendents of education service districts and two by the deans and directors of teacher education in both public and private institutions of higher education in Oregon.

Three additional reviews were obtained of the proposed support system in the form of feasibility tests. Three regional consortia, each involving two or more local districts, one or more education service districts and one or more institutions of higher education prepared staff development/program improvement plans around identified program improvement needs. After developing their respective plans, and assigning role responsibilities and cost projections for their implementation, each member of the three consortium groups made an independent judgment as to the feasibility of carrying out their work plans as structured. These judgments were summarized and reported to State Department and 4-State project personnel. The feasibility tests, and the conclusions drawn from them, are described in greater detail in subsequent pages.

Organization Of The Report

The report is organized in a manner to show how the 4-State Project built on the work of the profession-wide study group as well as the contributions that the project has made in its own right. Accordingly the first section of the report summarizies the major accomplishments of the study group. This is followed by three sections that spell out the contributions of the 4-State Project, giving special attention to the design that emerged from the project for the support of local districts

in their staff development/school improvement efforts. The report closes with a listing of steps that need to be taken in moving to implement the proposed support system.

WORK PRECEDING THE PROJECT: THE PROFESSION-WIDE STUDY GROUP FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL

Oregon has been working toward the design of a staff development/school improvement support system for several years. Work started three years ago with a study of inservice education by the deans and directors of teacher education programs within the state. As this study progressed it broadened to a profession-wide study group, and its focus expanded to include the continued professional development (CPD) of school personnel throughout their professional lives. The work of the study group as a whole is reported in the three volumes cited previously (see p 1). The major contributions from the work of the study group, from the point of view of the 4-State Project, are described briefly in the paragraphs that follow.

A Data Base

From the outset the profession-wide study group had three aims. The first was to become familiar with the statutes, rules and policies that govern the continued professional development of school personnel in Oregon. The second was to become familiar with the programs, procedures, resources and needs that exist in the state with respect to this relatively neglected aspect of education. The third, in light of this information, was to design a system of support that would help schools in Oregon meet the staff development needs they face as they implement the new Standards, Public Law 94-142, and various other programs of their own or someone else's choosing.

More than a year was spent in collecting data related to these aims. Information was collected about policies (statutes and administrative rules) currently governing the continued professional development of school personnel in Oregon, responsibilities that have been assigned to various institutions and agencies within the state for the regulation and support of professional development activities, and how these activities tend to be financed. Information also was collected on professional development activities pursued by teachers and school administrators, who provided these activities, and their perceived value or worth. Finally, information was collected on monies actually being spent in the state for continued professional development activities engaged in by school personnel.

Three major investigations were undertaken by the study group to obtain this information. These included (1) a survey of 450 teachers and 250 education specialists randomly selected within seventeen school districts in the state; (2) a survey of 250 principals and vice principals randomly selected from all school districts in the state; and

(3) an intensive, on-site study of the policies, procedures, practices and financial arrangements surrounding continued professional development activities within the seventeen school districts from which the teachers and education specialists were selected. The seventeen districts studied varied systematically as to size and geographic location.

In addition information was collected from a number of institutions and agencies on monies currently being spent in support of the continued professional development of school personnel, including institutions of higher education, the Division of Continuing Education, the State Department of Education, Intermediate Education Districts, and selected professional associations. A pilot study involving on-site surveys with teachers, education specialists and administrators from the seventeen districts studied also was carried out.

An overview of procedures followed in these various studies, and a summary of findings from them, are provided in the second document cited on p 1.

Definitions

Although a wide array of activities support the continued professional development of school personnel, educators do not appear to have an agreed-to terminology for discussing such activities. After careful consideration a language was adopted by the study group that involves five essential terms: Professional Development, Initial Professional Development, Continued Professional Development, Inservice Studies, and Advanced Studies. These are defined briefly in the paragraphs that follow.

PROFESSIONAL DEVELOPMENT: The gradual and continuing process of accumulating the knowledge, skill and sensitivity needed to function effectively in specified roles in particular school settings, commencing with entry to an approved teacher preparation program and terminating with retirement. The two major phases of professional development involve growth that occurs prior to assuming a formal teaching, specialist or administrative position and growth that occurs after assuming such a position.

INITIAL PROFESSIONAL DEVELOPMENT: The acquisition of the knowledge, skill and sensitivity needed to perform effectively upon entry to a particular teaching, specialist or administrative role within the schools. Generally speaking programs leading to an initial level of professional development are offered by institutions of higher education and involve a core of work in the liberal arts and sciences, basic studies in the disciplines, basic studies in the profession, and supervised field experiences in schools.

CONTINUED PROFESSIONAL DEVELOPMENT: The acquisition of new and advanced knowledge, skill and sensitivity that enhance performance as a teacher, specialist or administrator subsequent to entry into the profession. Continued professional development occurs through both informal and formal learning experiences. Informal learning experiences include reading, exchange with colleagues, attendance at professional meetings, and on-the-job experience generally. Formal learning experiences are usually of two kinds: inservice studies and advanced studies.

INSERVICE STUDIES: Learning activities pursued by teachers, specialists and administrators that are designed to enhance job performance within a particular school setting. Generally speaking inservice studies are designed to satisfy specific staff development needs within a district or a state, and usually are sponsored by a local district, a state agency or a professional association. Some inservice activities may be accepted by institutions of higher education for advanced certification or advanced degrees. Some districts also provide their own system of "credits" for inservice studies.

ADVANCED STUDIES: Learning activities pursued by teachers, specialists and administrators that update and expand the knowledge, skill and sensitivity they bring to a school and community as a professional educator. Generally speaking advanced studies are designed to keep teachers and administrators abreast of current developments in their related fields of study, and enhance the conceptual and theoretical base from which they operate. Programs of advanced study usually are offered by institutions of higher education, and usually lead to an advanced certificate or an advanced degree.

The relationships among these various items are illustrated in Figure 1. Related terms, and the literature in which they appear, are reviewed in the third document cited on page 1.

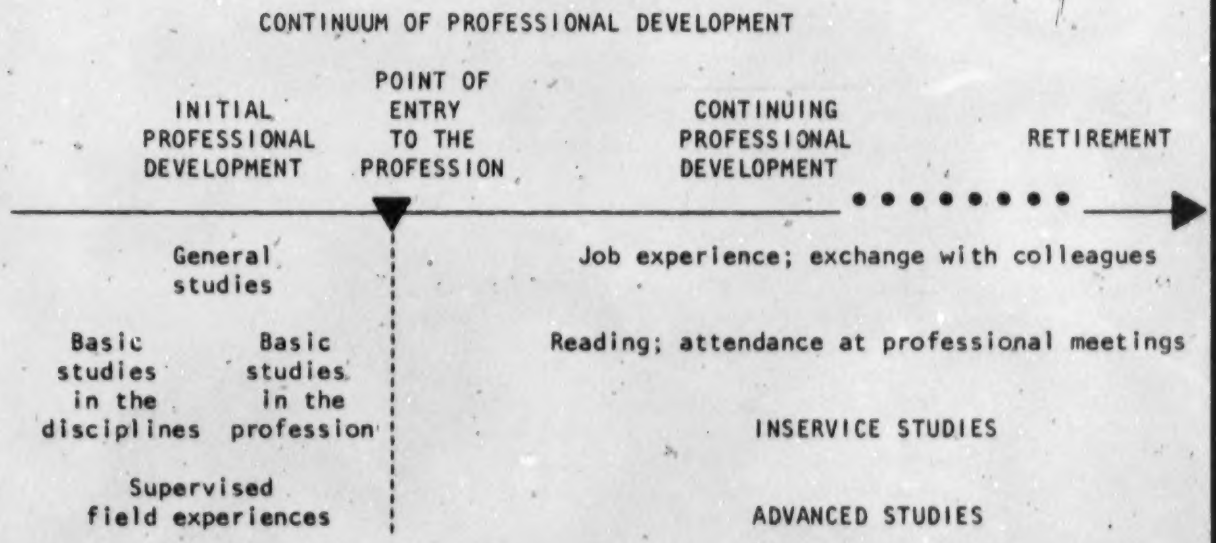

Figure 1. A framework for thinking about the continued professional development of school personnel

Premises

Ten basic premises were agreed to by the study group. These, in combination with the goals that follow, provided the basis for the policy and procedural recommendations that were made by the study group.

1. To continue practicing in the profession, certificated personnel should be able to demonstrate their ability to perform the functions expected of them, including the ability to achieve desired learning outcomes with students, and to show they have kept up with recognized developments in their field of specialty.

2. Professional development should be an individualized, continuous, and systematic process whereby all education personnel obtain professional training.

3. Individual professional development plans should be jointly developed and approved by the district and by the professional involved.

4. Professional development activities should be responsive to individual and district needs, as well as to state goals and priorities.

5. Teachers should be represented in planning and implementing professional development activities.

6. Professional development programs should be linked to identified needs of students.

7. A comprehensive professional development program should utilize colleges, education service districts, local districts, professional organizations, experienced teachers, administrators, and other appropriate groups in planning and carrying out the program.

8. The financing of continued professional development activities should reflect the principle of "costs assumed according to interests served."

9. To implement effective continuing professional development programs for school personnel throughout the state some means must be found to identify and make available to schools the full range of resources that can be drawn upon for this purpose.

10. To maintain effective professional development programs for school personnel some means must be found to permit a continuing dialogue among school personnel, teacher educators and citizens of the state about the continued professional development needs of school personnel, and how best to be responsive to these needs.

Goals

Six long-term goals were established by the study group. While these were goals that could not be achieved by the study group alone, they served as guides in forming study group recommendations. They also serve as standards against which to measure the effectiveness of actions taken in response to the recommendations.

GOAL 1. Personnel in schools throughout Oregon who are current in their fields and successful in the performance of their jobs.

GOAL 2. Local districts throughout the state that are organized and funded to support staff development programs.

GOAL 3. Education service districts and institutions of higher education throughout the state that are organized and funded to support local districts in their staff development efforts.

GOAL 4. The State Department of Education organized and funded to help local districts design and implement staff development programs, and to help education service districts and institutions of higher education coordinate their efforts to support schools in this process.

GOAL 5. Institutions of higher education offering programs of advanced study in the profession and related disciplines that are of high quality, are in keeping with advanced certification requirements set for school personnel in the state, and are adapted to fit the professional strengths, weaknesses and experience of the individuals involved.

GOAL 6. A mechanism to insure continuing dialogue among school personnel, teacher educators and citizens of the state about the continued professional development needs of school personnel, and the programs required to be responsive to these needs.

Policy Recommendations

Six policy recommendations were made by the study group. Three of these dealt with inservice studies, and one with advanced studies. Two were general in nature. None of the recommendations called for changes in statutes or administrative rules that now exist with respect to education in Oregon.

In combination these six recommendations were intended to lay a foundation for a cost-effective approach to the continued professional development of school personnel throughout the state.

POLICY RECOMMENDATION #1: Encourage each local district to establish and operate, in consultation with its personnel, a staff development program that is responsive to student, staff, district and state needs.

POLICY RECOMMENDATION #2: Identify, catalogue, and cause to be developed when lacking, the instructional resources and expertise needed by districts to plan and operate staff development programs, organize

these resources to make them available to districts, and inform districts about how they can gain access to them.

POLICY RECOMMENDATION #3: Obtain the information needed to design effective and cost-efficient local staff development programs, and a statewide system of support for these programs.

POLICY RECOMMENDATION #4: Improve the quality and increase the flexibility of programs leading to the STANDARD TEACHING Certificate, SPECIALIST Certificates and ADMINISTRATIVE Certificates for school personnel.

POLICY RECOMMENDATION #5: Develop guidelines for funding professional development activities for school personnel that reflect the principle of costs assumed according to interests served.

POLICY RECOMMENDATION #6: Establish the present profession-wide study group as an AD HOC INTER-AGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL that will (a) continue as a forum for the discussion of matters pertaining to the professional development of school personnel in Oregon; (b) advise the Oregon Board of Education, the Oregon Board of Higher Education, the Teacher Standards and Practices Commission, the Oregon Educational Coordinating Commission and the independent colleges and universities that prepare teachers in matters pertaining to the continued professional development of school personnel; and (c) help coordinate the efforts of the institutions and agencies that share responsibility for the quality of schools and school personnel within the state. The COUNCIL, so long as it exists, will submit biennially to each constituent group a summary of its activities and the progress that is being made in implementing the above recommendations.

Policy Acceptance

With the exception of the Oregon Federation of Teachers all institutions, agencies and professional associations represented on the profession-wide study group have formally adopted the recommendations made by the study group.* Except for several acceptance letters that were "conditional," or that were accompanied by recommendations for change in the wording of either a policy or procedural recommendation, all approved the policy recommendations in principle and supported the creation of an Inter-Agency Council for the Continued Professional Development of School Personnel.

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* Formal approval on the part of OFT has been delayed because of leadership change and administrative delay. The OFT representative to the study group played an exceptionally active and constructive role in the work of the group. It is our understanding that as a professional organization OFT supports the policy recommendations of the group.

Formation of the Inter-Agency Council

The concluding recommendation of the study group was to establish a council that would carry forward the work initiated informally through the study group (see Recommendation #6, p 8). The proposed Council has now been established, and operating procedures developed. Four additional teacher representatives, and one representative of administrators responsible for personnel development within local districts, have been added to the Council. Expenses involved in Council participation by these "non-aligned" members are being assumed by the Teacher Standards and Practices Commission. The operating procedures adopted by the Council at its May 15 meeting are attached as Exhibit B.

THE 4-STATE PROJECT: EXTENDING THE EMPIRICAL WORK OF THE PROFESSION-WIDE STUDY GROUP

In undertaking its work the study group held the view that a strong data base was needed to guide its deliberations (see pp 3 and 4 for a description of the information collected). The largest of the data sets collected by the study group, however, was analyzed only cursorily. This was information collected from teachers, specialists and principals on the nature of the professional development activities in which they had engaged during the 1976-77 calendar year, who paid for the activities, the value gained through the activities, etc. Funds from the 4-State Project were used to extend the analysis of this information, focusing particularly upon the perceived value of CPD activities when ordered according to provider and reason pursued.

A second line of empirical work also was undertaken through the 4-State Project. In keeping with the design requirements for strong evaluative data in the PROTOTYPE FOR STATEWIDE PLANNING developed through the project the State Department joined with a regional education cooperative to collect baseline data in a sample of schools for use in years ahead to determine the effects of implementing the proposed staff development/school improvement support system. Data were collected in thirteen districts in the mid-Willamette Valley area. These thirteen districts represented in size and organizational structure most districts in the state. Data were collected on the attitudes of fourth, seventh and eleventh grade students toward specific subject areas, as well as school generally, and the perceptions of these students about their school as a place to learn. Data were collected from teachers, specialists and principals, at all grade levels, on their perception of their school as a place to work, their involvement in decisions affecting school programs, and their opinions about school practices reflected in the new model of schooling being implemented in Oregon. Data also were obtained from school personnel on the perceived impact of Public Law 94-142, the present organizational structure of their schools, instructional programs, etc.

Funds from the 4-State Project were used to assist in the analysis of these data. The data collected during the 1978-79 school year are viewed as the first round of data to be collected over a five year

period of time, a period of sufficient duration to permit the impact of the proposed support system to be assessed when implemented.

Reports from both of the analyses carried out with project funds are available upon request.

THE 4-STATE PROJECT: EXTENDING THE CONCEPTUAL WORK OF THE PROFESSION-WIDE STUDY GROUP

One of the major contributions of the study group was the conceptual clarification it brought to the field. The concepts and definitions that evolved through the work of the group (see pp 4 and 5) were slow in coming, but once gained permitted a level of understanding and discourse that was not possible without them.

The focus of the 4-State Project on staff development to enhance student learning, and the requirement that a statewide support system for staff development be designed, caused the concepts and definitions developed by the study group to be reassessed. By-and-large they held up well, but as the project progressed it was found to be advantageous to split the concept of INSERVICE STUDIES into two separate though related parts. One part focused on staff development activities of the kind that tend to be initiated by local districts with a view to school improvement. The other focused on the more subtle, pervasive and diffuse aspects of "inservice" experience that contribute to professional development, for example, the understanding gained through experience, exchange with colleagues and guidance offered through professional associations. For purposes of the 4-State Project these sub-divisions of INSERVICE have been labeled STAFF DEVELOPMENT/SCHOOL IMPROVEMENT and COLLEAGUE EXCHANGE/PROFESSIONALIZATION.

By combining these distinctions with the study group's language of ADVANCED STUDIES three essentially separate though interdependent CPD support systems can be seen to exist, each having to a large extent its own governance structure, management procedures and funding sources. These are

- The STAFF DEVELOPMENT/SCHOOL IMPROVEMENT support system;
- The ADVANCED STUDY/CERTIFICATION support system; and
- The COLLEAGUE EXCHANGE/PROFESSIONALIZATION support system.

The interdependence of the three systems, and the relationship of the Inter-Agency Council to them, is shown schematically in Figure 2.

Before describing the three support systems, a word about their interdependence. Even though each system serves relatively distinct purposes, and has its own governance, management and funding structures, the lines between them are permeable. Some staff development activities may obviously qualify as "advanced study;" some advanced studies clearly serve "staff development/school improvement" purposes; and exchange with colleagues tends to be involved in both, and to support both after formal learning experiences are completed.

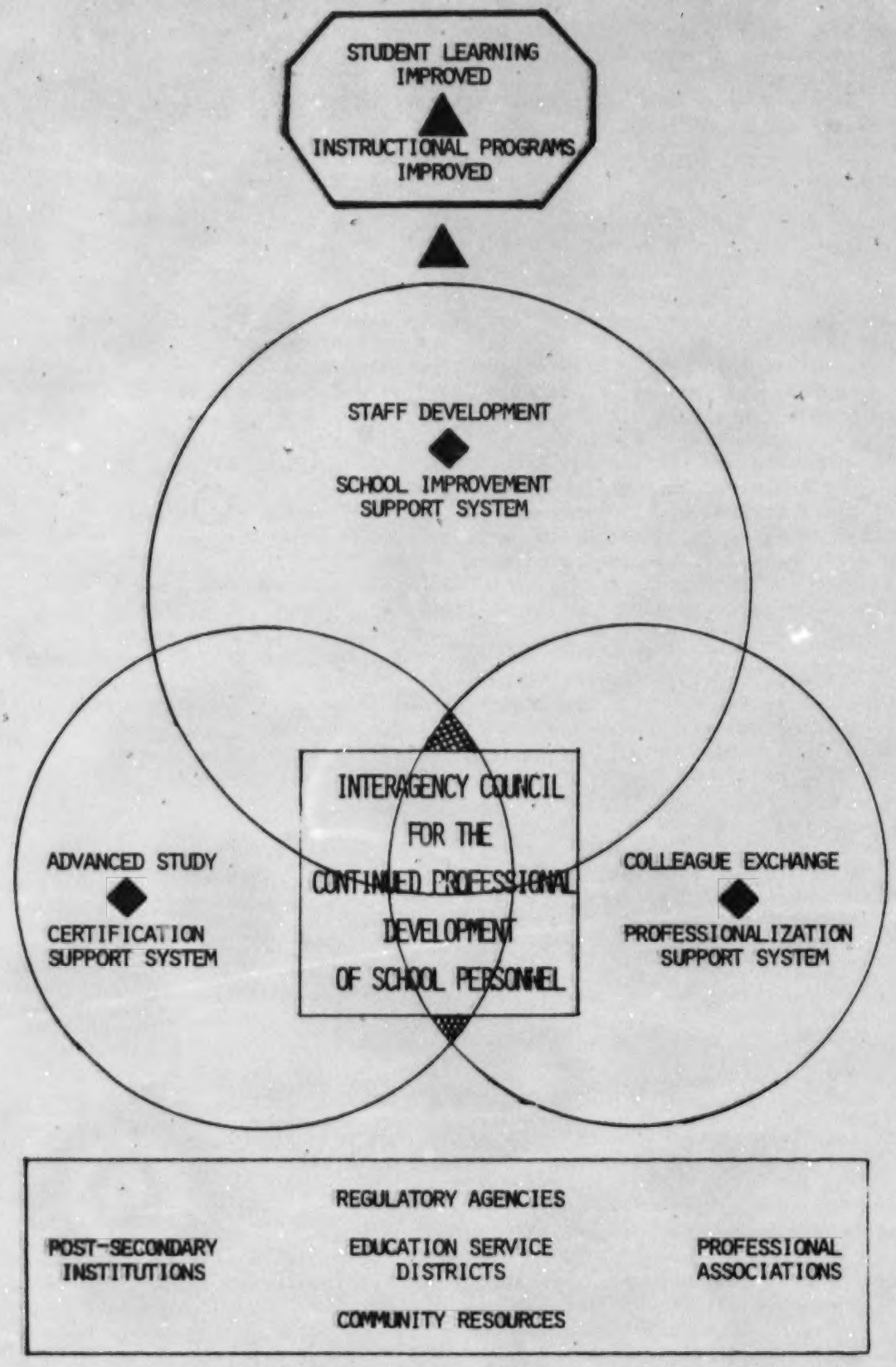

Figure 2. Key elements in the proposed profession-wide, cooperative support system for school personnel

In many respects this interdependence is good, and needs to be fostered. There is danger, however, in pushing it too far. Each of the three support systems serve different purposes, and for optimal development as professionals school personnel need ready access to all three. A well rounded CPD program for teachers and other school personnel must address the theoretical underpinnings of instruction, must deal with the application of theory to local practice, and must provide opportunities for sharing knowledge and experience with colleagues. To stress too heavily the interdependence of the proposed support systems risks losing the distinctiveness of their purpose. This in turn carries the risk that critically needed avenues of support for the continued professional development of school personnel will be lost through oversight or over-emphasis.

The Staff Development/School Improvement Support System

This is the proposed support system that is to serve most directly the improvement of schools through staff development. In this sense it is the support system that addresses most directly the requirements of the 4-State Project, that is, the ". . . improvement of student learning through staff development." It also is the support system that is most responsible for providing the kind of assistance to school personnel envisioned by the study group in their definition of inservice studies, that is, "learning activities pursued by teachers, specialists and administrators that are designed to enhance job performance within a particular school setting."

As viewed by those responsible for the 4-State Project the operation of an effective staff development/school improvement support system is fundamentally the obligation of local districts, education service districts and the State Department of Education. Contributions may be made to school improvement through advanced study and certification requirements, or through colleague exchange and the development of school personnel as professionals generally -- as indicated in Figure 2 -- but the obligation for the improvement of school programs through staff development rests primarily with those institutions and agencies that carry statutory responsibility for effective school programs.

The proposal to establish a well-defined staff development/school improvement support system has two important implications. One is economic; the other political. From an economic point of view new funds, at least in the near future, will not likely be forthcoming to operate the proposed support system. In time some state support for schools might be earmarked for this purpose, but until that time the best option for new resources, as pointed out by the profession-wide study group, is better utilization of existing resources.

Given this point of view, and the sizable resource base currently available in Oregon for the continued professional development of school personnel, it is proposed that the Staff Development/School Improvement Support System be funded at the outset through the pooling of resources by and the articulation of programs across local districts, education service districts and the State Department of Education. Specific arrangement in this regard will depend on local circumstance, and will require

time to work out, but recently passed legislation (HB 2393) calls for precisely this kind of resource pooling/coordination in providing services to schools for the education of the handicapped. More is said about funding later in the report.

On the political side the governance of the proposed support system probably will rest with school administrators and local boards. Given the times and the politics that have emerged nationally with respect to the continued professional development of school personnel teachers undoubtedly will have a voice in its governance, but so long as the focus of the system is primarily on the improvement of schooling the institutions and agencies that have statutory responsibility for operating school programs probably will control its governance. By contrast the governance of the proposed Colleague Exchange/Professionalization Support System is expected to follow more nearly after the model now being tested in the national teacher center program.

One additional observation about the proposed Staff Development/ School Improvement Support System. As the concept of job related staff development was discussed in the 4-State Project it became increasingly clear that the issue of staff development and school improvement were inseparably intertwined. The improvement of school programs almost by definition requires staff development, for it is the manner in which programs are implemented by staff that determine their effectiveness. In the reverse, if staff development is to improve the quality of schooling it cannot be independent of the instructional or support programs which basically define the opportunities provided by schools for students to learn. While it is true that the learning of students may be enhanced to some degree by the professional development of school personnel independent of school programs, for example, by teachers mastering a new body of literature or a new set of teaching skills, students are influenced most directly by the instructional programs operated by a school and these can be improved only through staff who are responsible for their implementation.

The Advanced Study/Certification Support System

This proposed support system corresponds to graduate studies that lead either to an advanced degree or an advanced certificate. In this respect it is an already established system, and reflects to a large extent a state's view of the level and kind of education desired for teachers and administrators of schools.

Historically advanced studies have been viewed as a major avenue to school improvement. Work at the graduate level, following undergraduate preparation and teaching experience, provides an opportunity for school personnel to keep abreast of latest developments in their fields and meet needs identified through practice. Within the past decade, however, the presumed relationship between advanced study and school improvement has been called into question for it is now clear that advanced study on the part of teachers and administrators does not necessarily lead to improved learning on the part of students.

As this awareness has emerged there has been an accompanying demand for "job-relevant" inservice and a growing criticism of graduate programs. Criticism ranges from course work being out-of-date or unrelated to the issues faced in today's schools, to the content of classes being a repetition of work taken as an undergraduate. Calls for change range from a total restructuring of graduate study, for example the substitution of internships for courses taken over a period of years, to having advanced study programs operated by local districts. It is argued that inservice programs offered by local districts can and do address theoretical as well as practical concerns, and may be just as valuable to a teacher's overall professional development as an advanced study program. It is argued further that where such programs are offered by local districts, or offered jointly by a school district and an institution of higher education, they should be approved for certification purposes.

It is the view of those who have been most closely involved with the 4-State Project that distinguishing between ADVANCED STUDY/CERTIFICATION and STAFF DEVELOPMENT/SCHOOL IMPROVEMENT SUPPORT SYSTEMS provides a conceptual and organizational framework for removing the cause of much of the criticism that has been leveled at advanced study programs in recent years. It does so in two ways. First, the distinction provides a structure within which to sort kinds and levels of educational experiences that tend to be jumbled together in most graduate education programs. Second, it provides a structure against which to clarify the most effective locations for engaging in graduate education experiences.

As graduate programs are now structured they reflect a state's or an institution's attempt to find a workable balance between the competing dimensions of advanced study. In education, as in any field, these are essentially three: (a) research vs practice; (b) theory vs application; and (c) the general vs the specific case. In education these also must be balanced between content and method, and take place within the constraints of a given number of "credit hours." Each state, and to some extent each institution within each state, strikes this balance differently. In addition, each institution strikes the balance differently for its various programs. In all cases, however, programs are fashioned that represent acknowledged trade-offs between these competing dimensions of advanced study -- with the hope that each program as fashioned will provide the balance that is needed for the various categories of education personnel it serves.

And here lies a major source of the criticism now being leveled at graduate education programs. Despite the best of efforts to find a functional balance between the competing dimensions of advanced study for the categories of education personnel served, especially at the advanced certification or master's degree level, the present set of trade-offs that have to be made almost assures that no one who is served will be fully satisfied. Those who want solid work in theory or research, or who want to be brought fully abreast of the latest work in a discipline or the latest practices that have evolved, are hard pressed to establish a course of study that meets these decisions. Those who want help in solving specific classroom or administrative problems, or who want training in specific curricula or instructional methods, also are hard pressed in most graduate programs to find satisfaction. What typically is encountered is an amalgam of all these things, with little opportunity for depth in any one.

There is a kind of catholic view about graduate programs in education that press for them to be all things to all people, and as a consequence they rarely serve anyone well.

Recognizing the proposed ADVANCED STUDY/CERTIFICATION and STAFF DEVELOPMENT/SCHOOL IMPROVEMENT SUPPORT SYSTEMS as separate but complementary avenues to the continued professional development of school personnel provides a way of overcoming some of the pervading weaknesses in graduate education programs. If responsibility were assigned the Staff Development/School Improvement Support System for providing the knowledge and skill needed to effectively implement instructional and support programs within a local district, and to improve these programs when needed, it would leave a better defined and more manageable set of responsibilities to the Advanced Study/Certification Support System. Put in another way, if the SD/SI Support System carried primary responsibility for effective job performance it would free advanced studies to deal more effectively than they do now with both the research and theoretical underpinnings to effective job performance and their application to practice. If this kind of differentiation of responsibility between the two support systems were to occur, and educational programs were developed accordingly, both schools and school personnel would be better served than they are now.

The matter of where CPD activities are offered probably is less important than what is offered, but the matter of location is a bone of contention. Many teachers and administrators resent the inconvenience and greater cost of physically having to go to institutions of higher education to take the courses they offer. This is doubly frustrating when the courses taken are perceived as weak or irrelevant.

From the college and university side, however, at least from the point of view of the publically supported institutions of higher education in Oregon, there are no incentives to offering instruction off-campus. Action was taken by the 1978-79 legislative assembly that authorized off-campus instructional programs (HB 2025), but the legislative Ways and Means Committee did not provide the funds authorized. The proposed distinctions between the Advanced Study/Certification and the Staff Development/School Improvement Support Systems, and the effective implementation of the latter -- with its heavy emphasis on local programs, job performance and staff development/school improvement efforts taking place at local sites -- appear to hold a greater promise for dealing with the issue of location than simply making it economically feasible for institutions of higher education to offer coursework off campus.

To be optimally effective CPD programs must help school personnel apply research findings and tested theory to local situations. How and where this is best done, and by whom, cannot be answered simply. The requirements of CPD programs must be analyzed from these various perspectives, and decisions made in light of particular contexts. In some cases courses offered by institutions of higher education on campus may be the best solution. In other cases courses offered off-campus may be best. In still others programs established by regional education units or local districts may be most desirable. The distinction that has been made between the Advanced Study/Certification and the Staff Development/School Improvement Support Systems is intended to clarify and extend these options.

Apart from recognizing the close relationship between the proposed Advanced Study/Certification and Staff Development/School Improvement Support Systems, and reaffirming the study group's position as to the importance of advanced study in the continued professional development of school personnel, no attention was directed to the design of this support system in the 4-State Project. This was due in part to the 4-State Project having to focus on the SD/SI Support System, and in part to the Teacher Standards and Practices Commission adopting new standards for advanced study programs in Oregon that incorporated the earlier recommendations of the study group. It is obvious, however, that if the differentiation of responsibilities that has been proposed between these two systems is to occur a great deal of attention will need to be given to the specifics of what this differentiation is and how the two systems are to work operationally.

At present costs for operating the proposed Advanced Study/Certification Support System are shared by school districts (through assistance with travel and tuition costs), the state (through subsidization of graduate programs), and the individual professionals involved (through payment of travel and tuition costs and certification fees).

The Colleague Exchange/Professionalization Support System

Discussion of this proposed support system first emerged in the 4-State Project, and is put forward as a desirable -- and perhaps necessary -- adjunct to the Staff Development/School Improvement Support System. As indicated previously this is the proposed support system that takes as its primary focus the needs and interests of teachers, specialists and administrators as individuals, in contrast to the needs or interests of a school, a local district, a teacher training institution, or a state education agency. It also is seen as the support system through which professional associations contribute most directly to the continued professional development of school personnel, and where the concepts embedded in the federal teacher center program are most likely to emerge.

Because the focus of the 4-State Project was essentially on the improvement of school programs through staff development, project resources were not directed to the elaboration of the Colleague Exchange/Professionalization Support System. Some of the issues involved in establishing such a support system were addressed, but not fully discussed. An Inter-Agency Council task force on funding considered some of the financial issues that would be involved, but since so little had been done in spelling out the nature of the proposed support system the task force was limited in the detail to which it could carry its deliberations.

Despite this limited progress the position of the advisory bodies to the 4-State Project has been that the concept of a Colleague Exchange/Professionalization support system, as outlined, warrants further consideration and that decisions about this support system should be made prior to implementing the proposed Staff Development/School Improvement Support System. The two obviously are interactive, and the nature of their interaction needs to be understood before moving too far on one or the other. An important source of information in considering the nature and role of a Colleague Exchange/Professionalization support system, especially as it

interacts with the other CPD support systems that have been outlined, will be evidence that is forthcoming on the impact of the teacher center movement on students, schools and school personnel.

The Inter-Agency Council for the Continued Professional Development of School Personnel

The Inter-Agency Council, as conceived by the study group and as expressed in its statement of operating procedures (see Exhibit B), is responsible for advising all institutions and agencies in the state with respect to these three support systems for education personnel. Of concern to the Council is the extent to which they are complementary and in combination provide the kind of support services needed for school personnel to continuously improve the quality of schooling provided to young people in Oregon. The Council is funded through an annual assessment of one hundred dollars per participating institution, agency or association. With the exception of the four teachers and one administrator who are "at-large" members of the Council, expenses incurred by Council members are assumed by the organizations they represent. The four state agencies which participate in the Council have agreed to rotate annually the responsibility of providing staff support to the Council.

Notes on a Parallel Support System for School Programs

In keeping with the intent of the 4-State Project the support systems described thus far take as their primary focus support for school personnel. In the course of the project, however, it was recognized that this is only one element in the equation. To be effective a support system for school personnel must be accompanied by a support system for the improvement of schooling generally. Technical assistance must be available to help schools strengthen curriculum and instructional practices, management practices, and support services. Keeping teachers and support system personnel abreast of current developments in all of these areas, and fostering research and development where needed, are critical to the school improvement process. How these support systems are to operate, where they should reside, and how they should be funded are issues that went considerably beyond the scope of the 4-State Project, but it was recognized that they are issues that must be dealt with if the proposed support system for school personnel is to be optimally effective. The perceived relationship between a support system for school personnel and a support system for school improvement generally is illustrated schematically in Figure 3.

THE 4-STATE PROJECT: DESIGNING A STAFF DEVELOPMENT/SCHOOL IMPROVEMENT SUPPORT SYSTEM

Developing specifications for the Staff Development/School Improvement support system was the central task of the 4-State Project in Oregon. Most of the resources available through the project were devoted to this purpose. The external reviews essentially took this as their focus, and it was the focus of the feasibility studies. The design of the SD/SI system is now ready for review by the institutions and agencies that

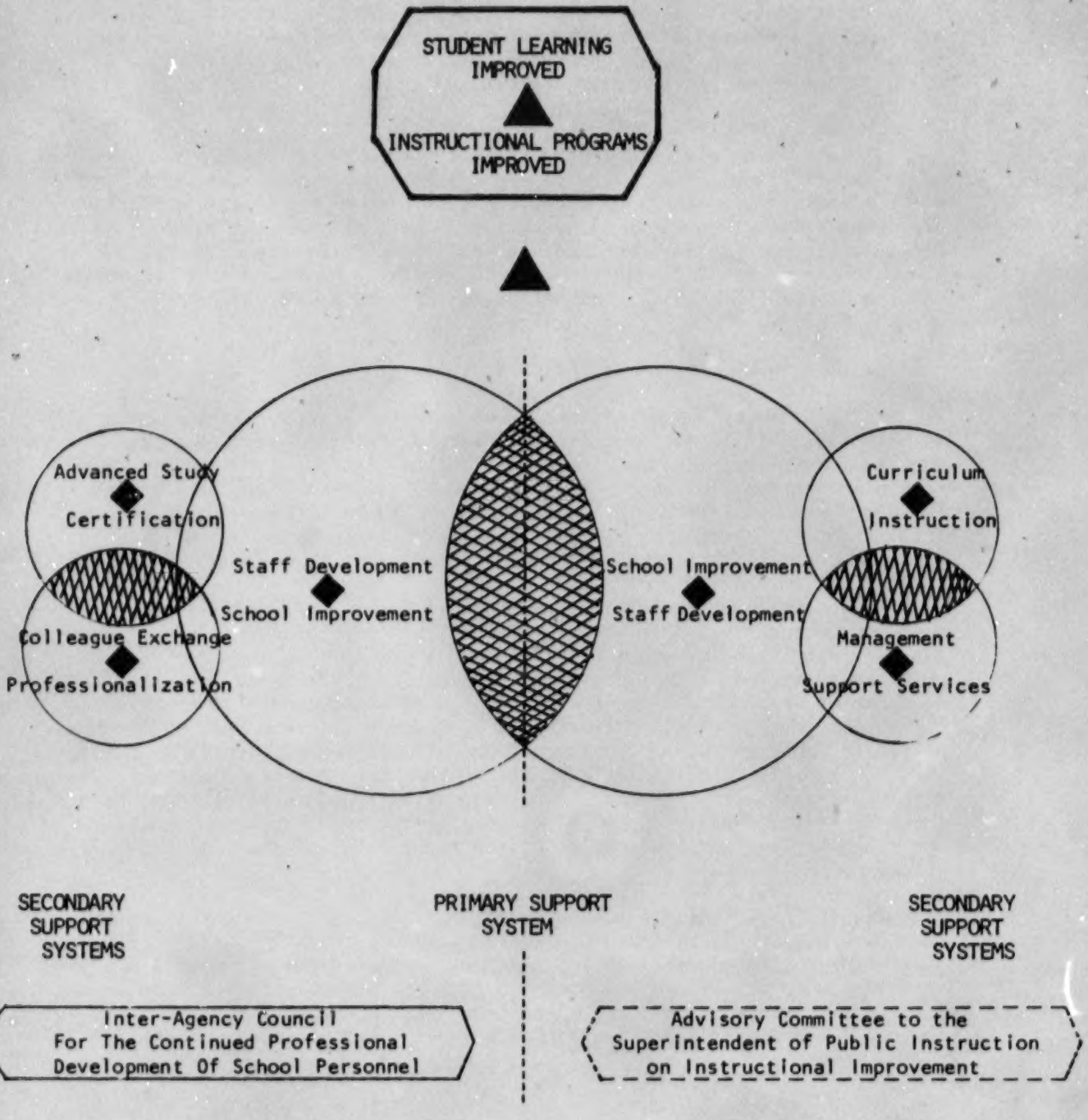

Figure 3. A framework for viewing the interdependence of the proposed support system for school personnel and a parallel support system for school programs

figure most centrally in it (local districts, education service districts and the State Department of Education). A review and refinement process involving these agencies is scheduled for the summer and fall months. Formal adoption of the proposed support system is expected by a year from this time.

The essential elements in the SD/SI system are outlined in the paragraphs that follow. The system derives from, and is consistent with both the policy recommendations of the profession-wide study group and the conceptual clarifications that have emerged through the work of the 4-State Project. Further refinements and elaborations undoubtedly will occur as the proposed system undergoes institutional review, but at least the broad outline of the system as it now stands is expected to remain intact.

The Mission of the SD/SI Support System

The mission or aim of the SD/SI support system is straightforward: to make available to local districts the resources they need to carry out the staff development/school improvement efforts they deem to be essential. Put in another way the aim of the proposed system is to make it possible for every school district in the state to do the best it can do, given local resources, circumstances and what is known about the educational process.

This mission statement is in keeping with the long established commitment on the part of Oregonians to local control of their schools. It is based on the assumption that local districts are in a better position than anyone else to know what improvements are needed in schools, and what staff development programs are needed to bring these improvements about. It also carries the recognition, however, that a district's access to the resources needed to implement staff development/school improvement efforts on a continuing basis is no guarantee that all of the educational outcomes the district desires for children and youth will be attained. What it does assure is a district's opportunity to continue to work toward outcomes that for one reason or another have not been able to be attained and that are still judged to be important.

In passing, it should be noted that this mission statement is consistent with the authority given by Oregon statute to local districts, education service districts and the State Department of Education. It also is consistent with the State Board goals, which call for suppport to local districts in improving instructional and support programs generally and in achieving the eductional goals that have been adopted for the state as a whole.

Outcomes Expected from the SD/SI Support System

Two short-range, two mid-range and two long-range outcomes are expected to follow from the mission statement. Each set of outcomes constitutes in effect an enabling set of conditions for the next. In combination all six outcomes constitute a chain of conditions, each one an enabler of the next. The outcomes, and suggested target dates for their realization, are listed below.

SHORT-RANGE OUTCOMES

1. A resource/service delivery structure established throughout the state on a regional basis, centering on one or more education service districts, that facilitates access by local districts to (a) the full range of educational resources within its region, (b) a common core of resources made available through the State Department to regional centers, and (c) negotiated resources from other regions. [Suggested target date: December 1980]

2. The resources available to districts regionally and within the state as a whole catalogued, described and organized in such a way as to make them available to districts through the regional resource/service delivery network. [Suggested target date: December 1981]

MID-RANGE OUTCOMES

1. All segments of the education community informed about the regional resource/service delivery structure for schools, their respective roles in it, and how it may be used. [Suggested target date: June 1982]

2. School personnel fully using the resource/service delivery system, and through its use achieving the immediate objectives of locally designed staff development/school improvement efforts, for example, faculty willing to implement a desired program change and having the skills to do so. [Suggested target date: June 1983]

LONG-RANGE OUTCOMES

1. The staff development and program improvement requirements contained in the November 1978 draft of the Minimum Standards for Elementary and Secondary schools in Oregon effectively implemented in all districts within the state. [Suggested target date: June 1985]

2. Discernable and acceptable progress in achieving the educational outcomes desired for children and youth in each local district, and in the state as a whole. [Suggested target date: June 1985]

Issues of faculty and administrator morale, support from patrons and constructive attitudes on the part of students toward school may be viewed by some as appropriate outcomes for the proposed support system, but these essentially are outcomes specific to local districts. The six outcomes listed are statewide in nature, and thus appropriate for a statewide system of support.

Performance Requirements

If the support system is to accomplish what is intended it must meet some demanding performance requirements. In a somewhat idealized sense

five performance requirements have been identified. The support system should:

1. Be responsive to the needs of local districts, as defined either in terms of the identified needs of students or school personnel, and at the same time responsive to the implications of policy decisions at the local, regional, state or national level.

2. Be supported by all institutions, agencies and associations concerned with the quality of schooling and school personnel in Oregon.

3. Operate through the joint participation and contribution of affected institutions, agencies and associations.

4. Make full and efficient use of all resources available to schools in Oregon.

5. Be continuously adaptive on the basis of cost and benefit information.

While these performance requirements may never be fully realized they have and will continue to guide the design of the proposed system.

Functions to be Performed

In general terms the functions to be performed by the SD/SI Support System are those required to achieve long-range outcome #1, as a means to long-range outcome #2. To achieve these outcomes requires that resources needed by local districts to carry out the kind of program assessment/improvement and staff development efforts called for in the Minimum Standards are available upon request, and are used to good purpose. To the extent that this is done, and these outcomes are realized, the SD/SI Support System will be judged successful.

In more specific terms the functions to be performed by the SD/SI Support System are defined in terms of the program assessment/improvement and staff development functions called for in the Minimum Standards. There are five such functions:

1. Periodically assess each instructional program for its effectiveness in terms of cost, student achievements, and related human factors;

2. On the basis of this assessment identify program improvement needs and establish program improvement priorities;

3. Identify alternative solutions for program improvement, select the improvement strategy that appears to be most promising and cost efficient, and design the kind of staff development program needed for its implementation;

4. Provide the resources a district needs, including expertise, to design and carry out the program improvement/staff development strategy selected; and

5. Evaluate the "improved" program to determine whether the improvement effort has led to the outcome(s) desired.

These five interdependent, cyclical steps are shown in Figure 4 in heavy lines. Figure 4 as a whole represents an effort to convey in outline form the goal-based model of schooling called for in the Minimum Standards.

Three observations need to be made with respect to the performance of these functions by the SD/SI Support System. First, they need to be performed at each level of system operation, that is, at the local, regional and state levels. Moreover, they need to be performed in a manner that is interactive and coordinated across levels for it is this coordination that will enable the proposed system to function effectively and efficiently. The organizational structure suggested for the SD/SI Support System in the next section of the report reflects this point of view.

Second, the specific form and substance of these functions will vary with each improvement effort. Each district will approach the staff development/school improvement process differently, and each will have a different set of issues to face in each improvement effort. Even so each district in each improvement effort must still perform in one way or another the various functions called for in the Minimum Standards, and it is this commonality that gives the SD/SI Support System purpose and utility.

Third, a distinction needs to be made between the staff development plan required of districts through the Minimum Standards, the staff development plans now required of districts for individual teachers and administrators as a consequence of legislative approval of SB 354, the relationship between the two, and the relation of both to program improvement efforts. All obviously are related but precisely how is still unclear. A staff development program designed by a district will undoubtedly reflect the staff development needs that accompany its program improvement efforts, but it is likely also to reflect the needs of individual staff that emerge from the evaluation and improvement plans called for in SB 354. Precisely how these will come together, and how much responsibility will be assumed by local districts for either or both, remains to be seen. Both requirements are new, and both are yet to be implemented. As implementation proceeds, however, the impact of these interactions on the design of the SD/SI Support System -- and on the design of both of the other proposed CPD support systems -- will need to be studied closely.

Organizing Structure

Currently the support provided to local districts in Oregon as they engage in staff development/school improvement efforts is fragmentary. Some is provided through institutions of higher education in the form of advanced studies; some through the State Department of Education; some through education service districts; some through professional associations; and some through the private sector. Local districts themselves are probably the largest provider of support for staff development/school

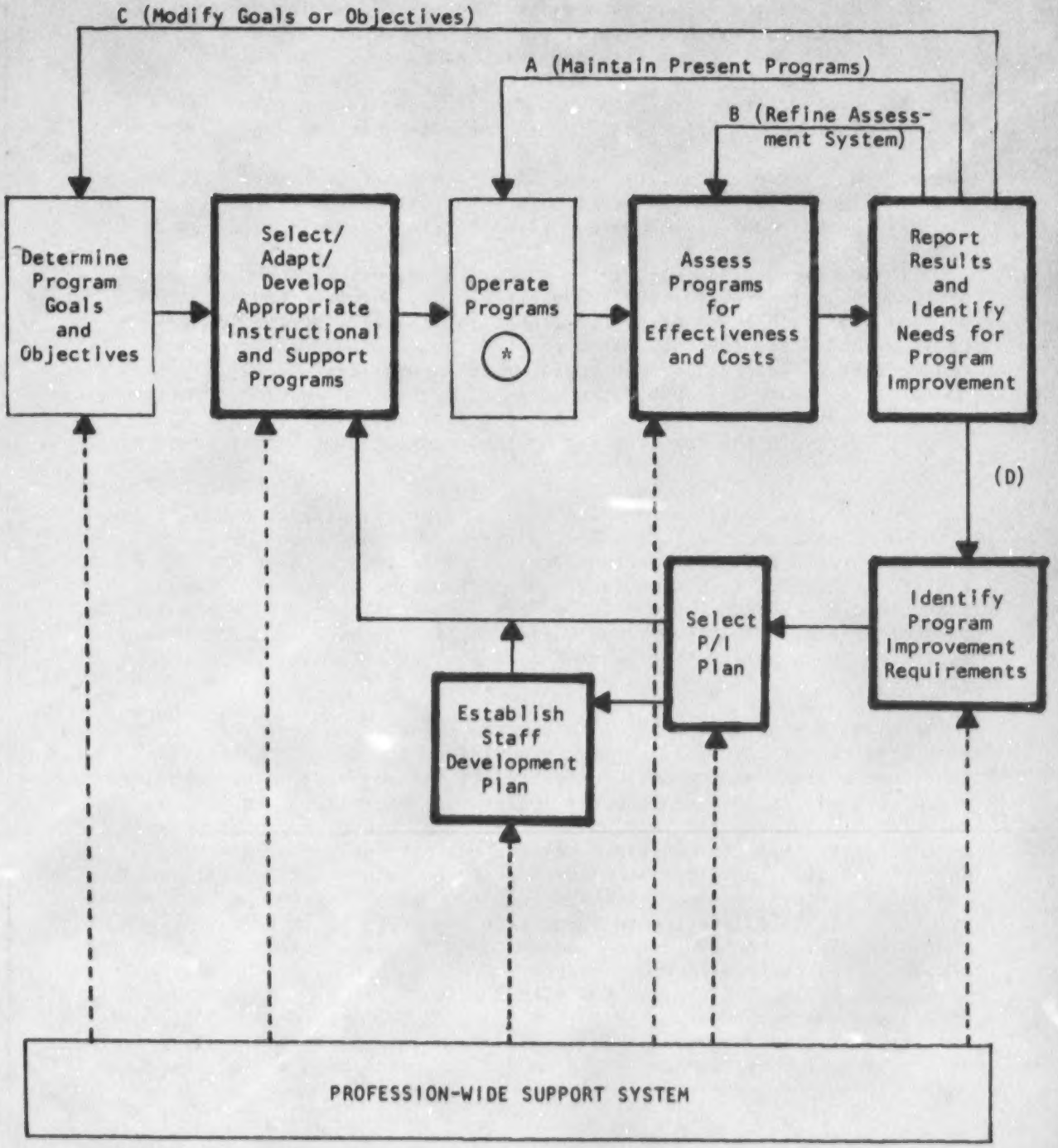
C (Modify Goals or Objectives)
A (Maintain Present Programs)
B (Refine Assessment System)
Determine Program Goals and Objectives
Select/ Adapt/ Develop Appropriate Instructional and Support Programs
Operate Programs
*
Assess Programs for Effectiveness and Costs
Report Results and Identify Needs for Program Improvement
(D)
Identify Program Improvement Requirements
Select P/I Plan
Establish Staff Development Plan
PROFESSION-WIDE SUPPORT SYSTEM

Figure 4. An outline of the major functions to be performed by local districts in the goal-based model of schooling called for in the Minimum Standards for Elementary/Secondary Schools in Oregon.

(*) A "continuous progress" approach to instruction is to be reflected in all instructional programs, but especially in the development of basic skills.

improvement activities, especially districts that are moderate in size or larger. Generally speaking there is little or no coordination among institutions and agencies as they delivery support services to schools, and rarely do any of the support agencies provide programs that are in direct response to identified program improvement needs on the part of schools. The present support system for staff development/school improvement in Oregon is depicted in Figure 5.

The proposed SD/SI support system is designed to overcome these limitations in two ways. First, additional structures are proposed that draw collectively on the resources available to schools in the state, and provide easy access on the part of schools to these resources. Second, it provides for a degree of closer coordination between the schools, the education service districts and the State Department of Education. As indicated previously these are the major participants in the proposed SD/SI support system, and at present there is little articulation among them.

What is being proposed is a "loosely coupled" support system that makes optimum use of the limited resources available to any one of the three participants by itself. By pooling the limited resources that are available, by coordinating their use, and by developing structures that permit schools to gain access to them, it is believed that schools will be far better served by support agencies than now is the case. The proposed structure for the SD/SI Support System is shown schematically in Figure 6. The proposed support system for schools and school personnel as a whole, including the Advanced Study/Certification and Colleague Exchange/Professionalization Support Systems, is depicted in Figure 7.

Roles and Responsibilities

To gain as much clarity as possible on the specifics of the proposed support system an effort has been made to spell out the roles and responsibilities of participating institutions. These have been reviewed by the Steering Committee to the project and by the Inter-Agency Council on two occasions, and by a task force of the education service district superintendents. Considerable work remains to be done before these will be in a form acceptable to everyone concerned, but as a means of conveying additional information on how the proposed support system is to operate they have been attached in their present form as Exhibit C. These need to be studied carefully for they begin to spell out the specifics of who does what for whom.

Funding Options

As discussed earlier (see the last paragraph, page 12) the approach recommended to funding the Staff Development/School Improvement Support System for the immediate future is one of pooling and coordinating existing resources. It is anticipated that this will occur primarily at the local level, and between local districts, education service districts and the State Department of Education. Both formal and informal organizational

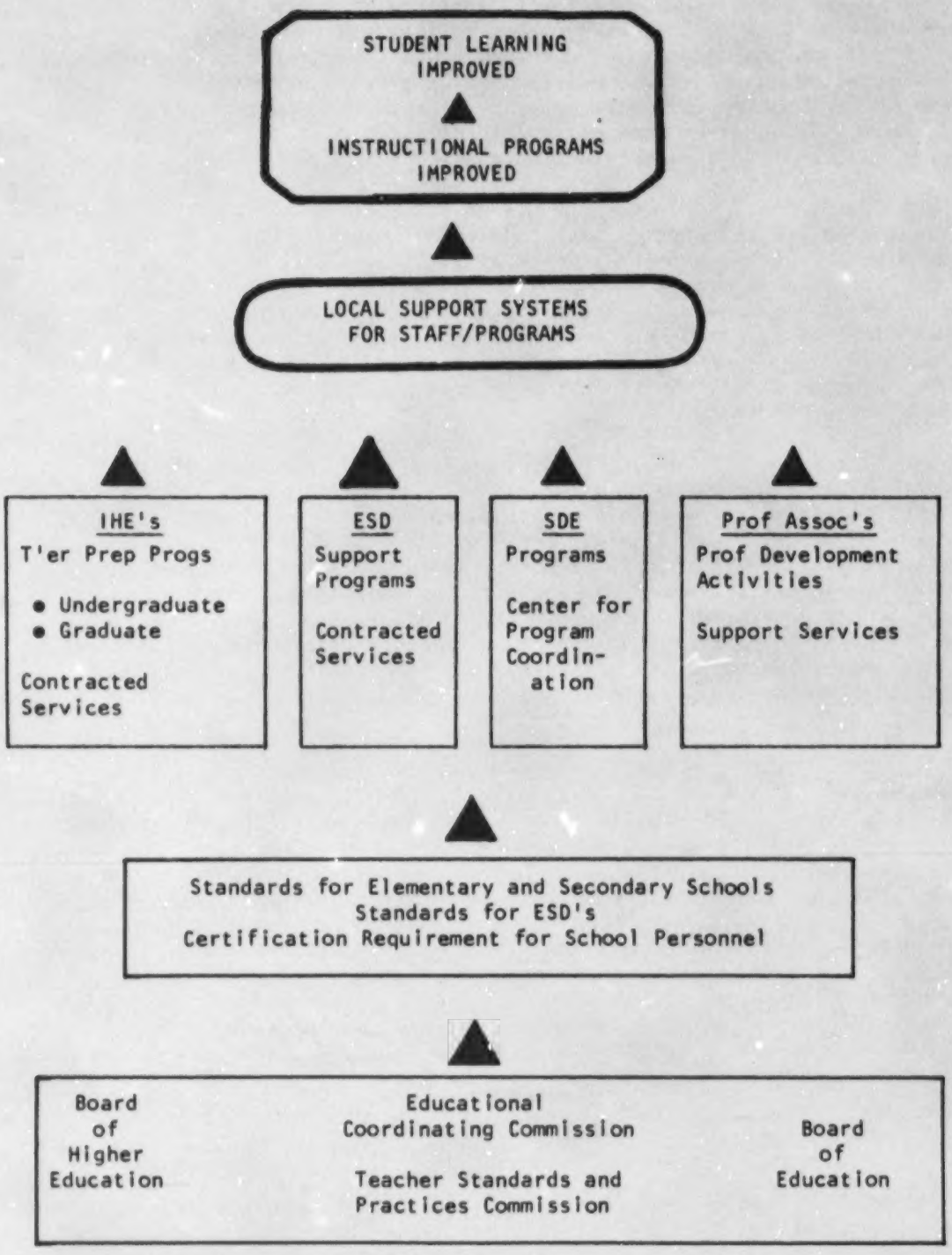

Figure 5. Elements in Oregon's support system for schools and school personnel, as of July 1, 1978

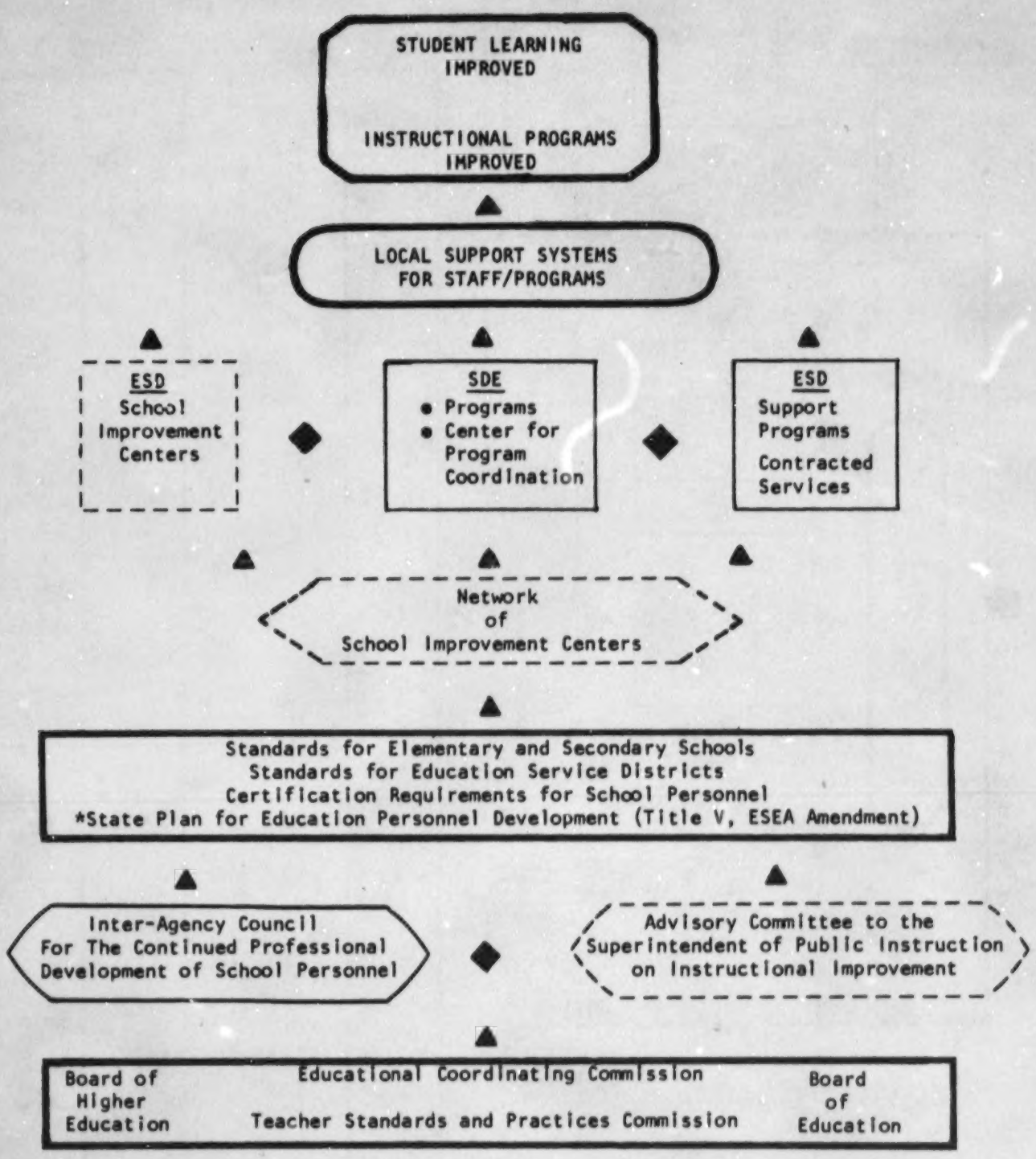
STUDENT LEARNING IMPROVED
INSTRUCTIONAL PROGRAMS IMPROVED
LOCAL SUPPORT SYSTEMS FOR STAFF/PROGRAMS
ESD School Improvement Centers
SDE
• Programs
• Center for Program Coordination
ESD Support Programs
Contracted Services
Network of School Improvement Centers
Standards for Elementary and Secondary Schools
Standards for Education Service Districts
Certification Requirements for School Personnel
*State Plan for Education Personnel Development (Title V, ESEA Amendment)
Inter-Agency Council For The Continued Professional Development of School Personnel
Advisory Committee to the Superintendent of Public Instruction on Instructional Improvement
Board of Higher Education
Educational Coordinating Commission
Teacher Standards and Practices Commission
Board of Education

Figure 6. Elements in the proposed staff development/school improvement support system (elements enclosed in solid lines presently exist)

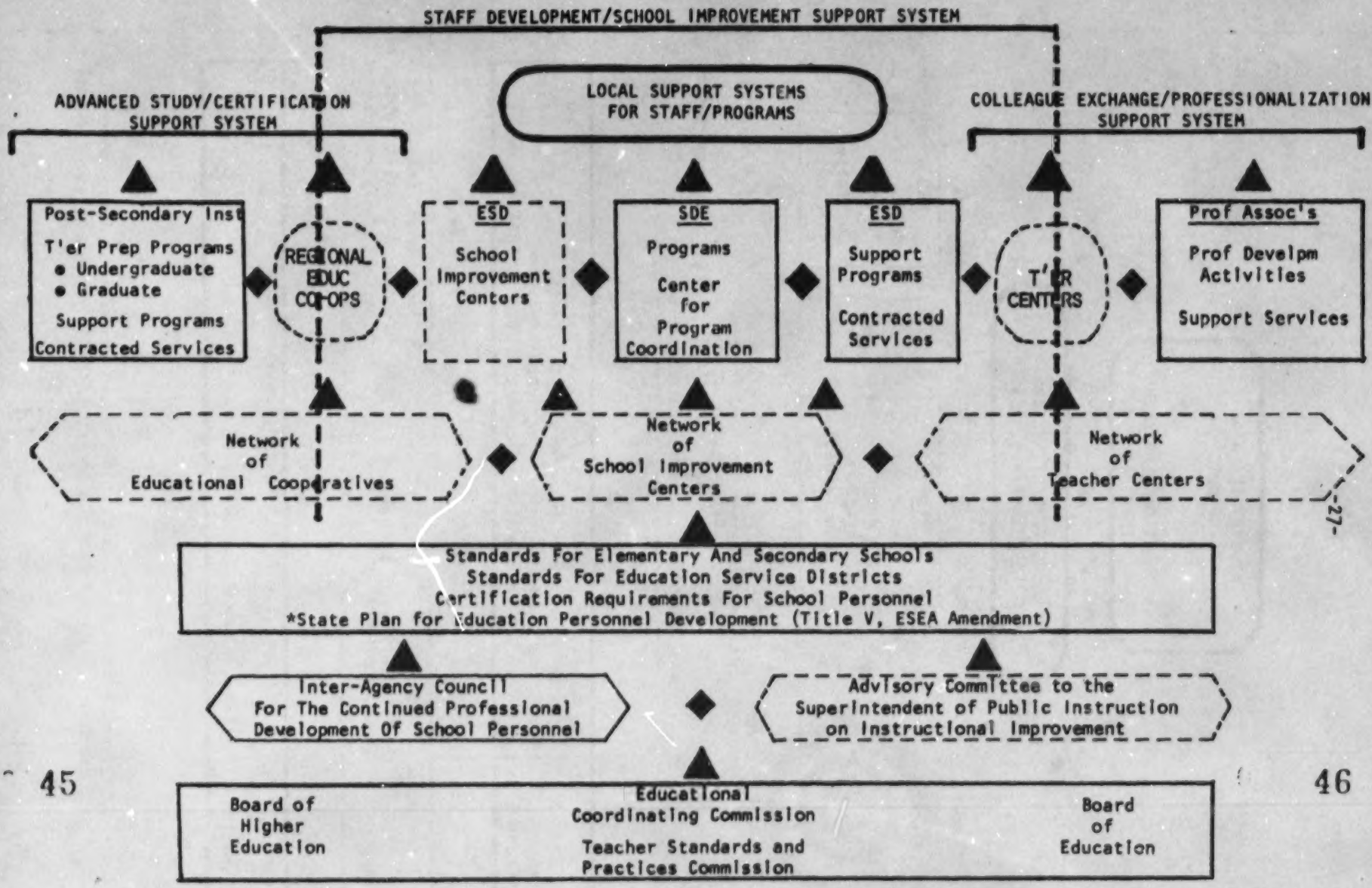

Figure 7. Elements in the proposed profession-wide, cooperative support system for schools and school personnel in Oregon (elements enclosed in solid lines presently exist)

arrangements are anticipated, but formally organized regional consortia (see pages 22 through 27) will be encouraged. Education service districts are seen as being central to the operation of regional consortia, though they are to be joined by post-secondary institutions and educational R & D agencies wherever feasible. The State Department of Education is to play a facilitating role in all this by adopting supporting policies, fostering the development of demonstration programs and using financial incentives where appropriate.

Three independent tests of the feasibility of regional consortia serving in a support capacity to local districts were undertaken during the course of the 4-State project, and in each case they appeared to be workable (see the next section of the report for a description of the feasibility studies).

There obviously are limitations to resource sharing and coordination as a means of implemeting the proposed SD/SI support system. The resources available to an institution or agency for sharing are limited, and no matter how well utilized these few resources can be stretched only so far. To assume otherwise would be unrealistic, and to some extent irresponsible from the point of view of long range planning. As a consequence, the Inter-Agency Council established a task force to study the question of funding, and to provide to the Council a listing of funding options. The task force was guided in its work by the general principle of "Costs Assumed According to Interests Served," a principle agreed to earlier by the profession-wide study group, but was not bound to it. The task force completed its work during the course of the 4-State Project, and reported its findings to the Council. A copy of the report is attached as Exhibit D.

On the basis of the work done thus far it is the view of those who have been most closely associated with the 4-State Project, including members of the Inter-Agency Council and the Task Force on Funding, that further clarification about the matter of funding will have to wait until further experience is gained with the proposed SD/SI support system. All experience to date suggests that the strategy of resource sharing and coordination will work, at least to a point. Time is needed, however, to see what specific funding arrangements can be made, and how successful they will be. What is clear is that new funds to support CPD programs are not likely to be available in Oregon in the near future. With the considerable resources now allocated to CPD activities by local and regional education units, and by the legislature in support of graduate programs offered by institutions of higher education -- coupled with the historic reluctance of the legislature to earmark state appropriations to local districts for specific purposes and the generally conservative attitude of both the legislature and local tax payers toward new programs and appropriations -- new or additional resources for CPD programs will come only after there is solid evidence that available resources are inadequate to do what needs to be done.

Granting that the issue of funding cannot be taken much farther at this time the over-riding question that remains is whether sufficient resources exist within the educational system to provide the help needed by local districts to do what they are being asked to do. If all goes as planned a preliminary answer to this question should be available in two or three years. Experience gained through emerging consortium arrangements, and through the coordinated planning between local districts, education

service districts and the State Department of Education called for in HB 2393, should provide a good deal of evidence in this regard. If it becomes clear that additional resources will be needed to effectively support schools in doing what they are asked to do the issue of funding options will emerge as a matter of central concern. When this occurs the work of the funding task force will serve as a solid point of departure.

Feasibility Tests

To get a sense of the feasibility of what is being proposed a decision was made to test key elements within the proposed support system on a trial basis. This was done through a request for proposals by the Superintendent of Public Instruction to test the workability of educational cooperatives as support systems to schools as they undertake staff development/school improvement efforts. Projects were to be funded through 4-State and other funds available to the Department. Each feasibility test was to involve an education service district, at least two local districts and an institution of higher education. Together these institutions and agencies were to plan a staff development/school improvement effort that was to extend for not more than 12 months, project cost and role responsibilities for its implementation, and in light of this information arrive at a judgment as to the workability of regional consortia as a support system to local districts.

Three proposals were received by the State Department and three were funded. One consortium, established around two local districts, was centered on the south coast. Another, established around three districts, centered in the eastern portion of the state. The third, involving six districts and three education service districts, centered in the Willamette Valley. The south coast consortium selected the development of a writing program as its focus of work; the eastern Oregon consortium chose the implementation of Public Law 94-142; and the mid-valley area chose to focus on programs in reading, writing and mathematics.

The results of these consortium based activities suggest that the support system for schools that is being proposed is feasible to implement, but not without careful attention to role relationships and clarification of purposes. Each consortium grouping encountered a different set of issues and concerns, and each was able to pool resources at different levels of effectiveness. All three consortia, however, were of the opinion that the proposed support system was feasible to implement, and holds considerable promise as a means of assisting local districts in staff development/school improvement efforts. Copies of the reports from the three consortia are available from the Center for Program Coordination, Oregon State Department of Education, upon request.

NEXT STEPS

As indicated in the opening sections of the report the proposed SD/SI support system needs further refinement and formal adoption. For this

to occur a number of steps need to be taken. These are outlined below, with targeted dates of completion for each in brackets.

1. Refine, clarify, extend the conceptual work carried out through the 4-State Project, with special attention to the role of the community colleges in the proposed CPD support system. [September 1979]

2. Submit the design and funding guidelines for the SD/SI support system to the Superintendents of education service districts, the Superintendent of Public Instruction and the Inter-Agency Council for the Continued Professional Development of School Personnel for a last round of review and refinement. [October 1979]

3. Following this refinement process submit the design and funding guidelines to each of the institutions and agencies represented on the Council for formal review and adoption. [February 1980]

4. Establish on a pilot/demonstration basis key elements within the proposed support system, for example, education service centers and regional cooperatives. [December 1979]

5. Establish organizational structures, priority activities and funding allocations as needed within the State Department to implement the support system as finally adopted. [July 1980]

6. Establish organization structures, priority activities and funding allocations as needed within Education Services Districts to implement the support system as finally adopted. [July 1980]

7. Establish guidelines for effective staff development/school improvement efforts in local districts, and make these available to personnel throughout the education community. [July 1980]

8. Reach tentative conclusions on the relationship of teacher centers to the proposed SD/SI support system, including how these centers might be funded locally or on a statewide basis if they are to be treated as part of the overall CPD support system. [June 1980]

9. Establish the Advisory Committee to the Superintendent of Public Instruction on Instructional Improvement. [June 1980]

10. Obtain legislative understanding and support for the proposed system of support for schools and school personnel. [December 1980]

11. Establish, as need dictates, a supporting network for educational cooperatives, school improvement centers and teacher centers.

12. Implement as soon as possible policies and procedures governing advanced study and certification programs for school personnel that cause them to link functionally to the identified needs of schools within the state as well as the needs of the individual professionals involved.

EXHIBIT A

COMPONENTS TO BE REFLECTED IN EACH STATE'S PLAN FOR STAFF DEVELOPMENT (Refined to Reflect the Oregon Context)

The following components were to be evident to some degree in the statewide system for establishing comprehensive staff development programs in Oregon, according to the educational context of Oregon.

a. Student achievement data and annual staff evaluation data used in designing staff development (inservice) programs.

b. Teachers and other education personnel provided help in developing and using goal-based curricula and goal-based instructional methods to meet the needs of all students.

c. Administrators, supervisors, and other education specialists provided help in supporting the efforts of teachers as they attempt to implement a personalized and goal-based approach to education.

d. Availability at the local level of alternative and optional staff development (inservice) programs.

e. Availability on a cyclical basis, at both the state and local levels, of information that informs policy decisions and fiscal management.

f. An awareness of faculty and administrators in institutions of higher education of the needs and operating procedures of the public schools.

g. Increased alternatives for advanced study by education personnel that satisfies both professional needs and certification requirements.

h. Effective allocation of state education agency resources in helping school personnel meet identified staff development needs.

i. Ongoing procedures employed by the state education agency to monitor the quality of school programs, and use this information as a basis for determining needed staff development programs.

j. Increased participation by education personnel in decisions pertaining to staff development (inservice) and advanced study programs.

k. Evaluation of local and state level educational goals as a basis for planning staff development programs.

EXHIBIT B

OPERATING PROCEDURES OF THE INTER-AGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL

AD HOC INTERAGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL

P R E A M B L E

In its report of June 1978, entitled "Getting More from Our Schools," the profession-wide study group on the continued professional development of school personnel made the following recommendation:

POLICY RECOMMENDATION #6

Establish the present profession-wide study group as an AD HOC INTER-AGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL that will (a) continue as a forum for the discussion of matters pertaining to the professional development of school personnel in Oregon; (b) advise the Oregon Board of Education, the Oregon Board of Higher Education, the Teacher Standards and Practices Commission, the Oregon Educational Coordinating Commission and the independent colleges and universities that prepare teachers in matters pertaining to the continued professional development of school personnel; and (c) help coordinate the efforts of the institutions and agencies that share responsibility for the quality of schools and school personnel within the state. The COUNCIL, so long as it exists, will submit biennially to each constituent group a summary of its activities and the progress that is being made in implementing the above recommendations.

Implementing Agency

No one agency; rather, a cooperative effort of all agencies represented on the COUNCIL. No change in statutes or administrative rules will be required to establish such a COUNCIL, or to maintain its operation.

Procedural Recommendations

It is recommended:

That the Oregon Board of Education, the Oregon Board of Higher Education, the Oregon Educational Coordinating Commission and the Teacher Standards and Practices Commission move to establish the proposed INTER-AGENCY COUNCIL for a period not to exceed three years, beginning July 1, 1978, and to provide through joint contribution the funds needed for the COUNCIL to carry out its assigned functions.

That the COUNCIL be composed of one representative each from the Confederation of Oregon School Administrators, the Intermediate Education Districts, the Oregon Board of Education, the Oregon Board of Higher Education, the Oregon Education Association, the Oregon Educational Coordinating Commission, the Oregon Federation Teachers, the Oregon Public Teacher Preparatory Colleges and Universities, the Oregon Private Teacher Preparatory Colleges and Universities the Oregon School Boards Association, and the Teacher Standards and Practices Commission, and that it be served by staff from an existing institution or agency. (See revision in ARTICLE III, below.)

That the COUNCIL be re-established for a period of not longer than three years, beginning July 1, 1981, if such action is judged to be in the best interests of all institutions and agencies concerned.

Rationale

To implement effectively a continuing professional development program for school personnel within the state, some means must be found to assure continuing dialogue among school personnel, teacher educators and citizens of the state. Some means also must be found to coordinate more effectively services offered by the various institutions and agencies that have responsibility for assuring the quality of schooling and the competence of school personnel. The study group is proposing that both of these outcomes can be achieved through the proposed INTER-AGENCY COUNCIL.

OPERATING PROCEDURES

ARTICLE I - NAME

This organization shall be known as the Ad Hoc Inter-Agency Council for the Continued Professional Development of School Personnel.

ARTICLE II - PURPOSE

SECTION 1. The purpose of the Council shall be to improve education by providing a forum for all interest groups within education to examine matters pertaining to the continued professional development of educational personnel, by:

1) Systematically soliciting information relevant to various aspects of continued professional development from each of those interest groups;

2) Communicating that information to all of the interest groups;

3) Informally monitoring progress made in the effort to facilitate and strengthen continued professional development statewide; and

4) Advising those interest groups, when appropriate, of needs, services, policies, and procedures pertaining to the continued professional development of educational personnel.

FURTHERMORE, for the Council to successfully accomplish these purposes, each agency, institution, or interest group represented on the Council shall:

1) Generally support the premises, goals, and policy recommendations in "Getting More From Our Schools;"

2) Regularly provide complete information to the Council on the concerns, needs, problems, and special interests with respect to the continued professional development of school personnel; and

3) Thoughtfully consider and promptly respond to, when appropriate, the issues addressed to it by the Council.

ARTICLE III - MEMBERSHIP

Section 1. Names of representatives to the Council shall be submitted by the member organizations, agencies, service providers, or other interest groups to the secretary-treasurer by July 1 of each year.

Section 2. The Council shall be composed of one representative from each of the following organizations:

Oregon Education Association
Oregon Federation of teachers
Confederation of School Administrators
Oregon School Boards Association

Section 3. Additional members of the Council shall be one representative from each of the following agencies:

Oregon Department of Education
Oregon Educational Coordinating Commission
Teacher Standards and Practices Commission
Oregon State System of Higher Education

Section 4. Also represented on the Council shall be a member from each of the following service providers:

Oregon Association of Colleges of Teacher Education - Public
Oregon Association of Colleges of Teacher Education - Private
Oregon Association of Education Service Districts
Oregon Community College Assembly

Section 5. In addition to the organizational membership identified above, the Teacher Standards and Practices Commission shall appoint to the council, from a list of nominees submitted by any education-related organization, four classroom teachers and one administrator with responsibility for staff development. The teacher appointees shall include:

one elementary teacher, pre-primary through grade five
one middle school teacher, grades six through nine
one high school teacher, grades nine through twelve
one special education teacher

The Teacher Standards and Practices Commission shall consider geographic and district size factors in making appointments to the Council.

Other qualifications for appointment shall be the same as those for appointment to the Teacher Standards and Practices Commission.

Section 6. The Council may, if it deems necessary, invite other organizations, agencies, service providers, or other special interest groups to appoint a representative to the council. A two thirds vote of the Council as constituted in Sections 2-5 above shall be required.

ARTICLE IV - OFFICERS

Section 1. The officers of the Council shall be a chair, a vice-chair, and a secretary/treasurer. These three individuals and one member-at-large of the Council shall serve as an Executive Committee. The secretary/treasurer shall be the representative of the agency providing staff support during the current fiscal year.

Section 2. The officers shall be nominated by a nominating committee and elected by the membership of the Council. The term shall be two years, with the exception of the secretary/treasurer, which shall be one year.

Section 3. The chair shall preside at all meetings, appoint the chair of the committees as they are formed, and have charge of conducting the business of the Council. The chair or chair-designate, in consultation with the members of the Executive Committee, shall set the agenda for each meeting and shall provide members with any necessary information. Any council member may request additions to the written agenda provided that the request reaches the chair at least ten days prior to the meeting.

Section 4. The vice-chair shall preside in the absence of the chair and assist the chair in the execution of business.

Section 5. The secretary/treasurer, with the aid of staff, shall keep all records, collect the dues, have charge of all money, pay all bills, send notices of dues payable, and regularly submit financial records to the chair. The secretary/treasurer shall prepare and distribute a brief summary of the Council meetings to members and interested parties. The summary will contain significant points of discussion and record action taken. A written annual report of the council's actions and accomplishments shall be made by July 1 of each year to all sponsoring organizations, agencies, service providers, or other interest groups. Additional reports may be issued as appropriate.

Section 6. A vacancy in any office (other than the chair) shall be filled by an appointment by the remaining members of the Executive Committee.

ARTICLE V - MEETINGS

Section 1. The Council will meet on the second Tuesday of July, September, November, January, March, and May.

Section 2. Meetings may be called or canceled by the Executive Committee.

Section 3. A minimum of four meetings will be held every year.

Section 4. No quorum will be required for conducting meetings. However, any absent member may request reconsideration of a question at the next meeting.

Section 5. The Council may invite guests to Council meetings.

ARTICLE VI - DUES

Section 1. The fiscal year of the Council shall be from July 1 to June 30.

Section 2. The dues shall be $100 per year, per organization, agency, service provider, or other interest group represented.

Section 3. The dues shall be spent on the activities specified in the preamble, elaborated in ARTICLES II and IV (5) of the Operating Procedures, or other activities approved by the Council.

ARTICLE VII - DECISION MAKING PROCESS

Section 1. The rules contained in Robert's Rules of Order, current edition, shall govern the Council.

Section 2. Every reasonable effort will be made to reach decisions by consensus. If consensus is not reached, Council reports will include minority as well as majority views.

Section 3. Anyone attending a meeting may speak to any issue. However, after a motion has been made and seconded, debate will be limited to members of the Council. Only the Council members will vote. The chair will be a voting member.

EXHIBIT C

ROLES AND RESPONSIBILITIES OF PARTICIPANTS IN THE STAFF DEVELOPMENT/SCHOOL IMPROVEMENT SUPPORT SYSTEM

Institutions And Agencies

Local School Districts

1. Identify school improvement/staff development needs
2. Establish priorities for improvement efforts
3. Prepare program improvement plans
   - determine the improvement(s) needed
   - determine how needed improvements are to be made
   - select resources and establish procedures for carrying out the needed improvements
   - prepare appropriate staff development plans
4. Implement the improvement effort, including needed staff training
5. Carry out the evaluations and maintain the records needed to determine
   - costs associated with the improvement effort
   - benefits associated with the improvement effort
   - whether the added benefits warrant the added cost
6. Report results of the improvement effort, and plan next steps as needed

Education Service Districts

PROGRAM SUPPORT AND CONTRACTED SERVICES

1. Services required by statute, for example, registration of teaching certificates and contracts; attendance supervision for districts with fewer than 1,000 students; processing of pupil personnel and basic school support reports; apportioning and distributing local school district funds; assisting the State Department of Education in providing State-level services and support of statutes and standards.

2. Management support services to local districts, for example, assistance with fiscal matters; coordinating elections; cooperative purchasing; data processing; transportation for special education students.

3. Instructional support services to local districts, for example, assistance with curriculum development and inservice programs; assistance in the design and operation of counseling and career education programs; test development and scoring services; media library and repair services.

4. Special education services, for example, assist in identifying resident exceptional children; assist in developing and implementing services to meet unmet needs of children identified as exceptional, especially services for low incidence handicaps that are high in cost; coordinate programs and planning for exceptional children across districts within a county, and between districts and the State Department of Education.

SCHOOL IMPROVEMENT CENTERS

1. Keep districts abreast of State and Federal requirements that could influence SI/SD needs.

2. Collate SI/SD needs from districts served.

3. Identify SI/SD needs common to two or more districts.

4. Contact districts who have common SI/SD needs about participating in cooperative improvement programs.

5. Inform districts of SI/SD assistance available through their regional cooperatives, through professional associations, or through the State Department of Education.

6. Upon request assisting districts in establishing needed SI/SD programs.

7. Keep the regional cooperative and the State Department informed about the SI/SD needs of local districts, and the costs and benefits associated with particular SI/SD programs.

State Department of Education

PROGRAMS

1. Identify emerging trends and problems.

2. Assist in establishing priorities for staff development and/or program improvement at the local, regional and state levels.

3. Provide program development assistance to local, regional and state agencies.

4. Provide research and development information that pertains to interests of local school districts, education service districts and community colleges.

5. Develop and publish curriculum guides, teacher handbooks and other program-related materials.

6. Facilitate the development, evaluation and description of model or demonstration programs, and make this information available to interested groups.

7. Assist local districts and education service districts understand and comply with new laws and regulations.

8. Provide in-service training sessions in basic instructional programs for local school personnel.

9. Provide systematic review and adoption of textbooks utilized in elementary and secondary education in Oregon.

CENTER FOR PROGRAM COORDINATION

1. Facilitate the development of materials and initiate procedures that inform local and education service district personnel about Oregon's profession-wide support system for schools and school personnel, and how access can be gained to the resources available through it.

2. Facilitate/arrange training opportunities for district and ESD personnel on establishing and operating Educational Improvement Centers.

3. Facilitate/arrange training opportunities for local and education service district personnel, and representatives from institutions of higher education, on establishing and operating Regional Education Cooperatives.

4. Coordinate, and make available to the network of School Improvement Centers and the network of Regional Cooperatives, the resources and expertise available through the State Department of Education.

5. Coordinate the identification of needs and priorities within the state for school improvement/staff development efforts at the local level.

6. Work with the joint boards and the Inter-Agency Council to establish programs that demonstrate the operation of the profession-wide support system for schools and school personnel, both regionally and locally, and establish procedures whereby evidence of costs and benefits associated with these programs are collected systematically.

Cooperatives and Support Networks

Regional Cooperatives

1. Provide assistance to School Improvement Center personnel in their work with districts, and access to resources available through one or more of the institutions/agencies participating in the cooperatives.

2. Pool resources/expertise available through the cooperative when needed to provide services called for by local districts served by the cooperative.

3. Assist institutions of higher education in the design and operation of preservice teacher preparation programs.

4. Assist institutions of higher education in the design and operation of advanced certification programs for all school personnel.

5. Assist the Board of Education and the Board of Higher Education in carrying out research, development, evaluation, demonstration, and dissemination activities that pertain to schooling or the preparation of school personnel.

Teacher Centers

1. Keep teachers and education specialists in schools served by the Center informed of advanced study and professional development activities available in the region.

2. Alert teachers and education specialists served to unusual professional development opportunities in the state or nation as a whole.

3. Broker individual teacher or specialist requests for technical assistance and special professional development activities.

4. Arrange professional development activities that have been requested by a group of teachers or specialists.

5. Work with School Improvement Center personnel to coordinate efforts, exchange information and share resources.

Network of School Improvement Centers

1. Problem solving with respect to information flow between the State Department, School Improvement Centers and the public schools.

2. Problem solving with respect to issues that emerge around the organization and operation of Improvement Centers.

3. Long-range planning with respect to school improvement/staff development efforts, and the role of School Improvement Centers within these efforts.

Network of Regional Cooperatives

1. Problem solving with respect to the role and interchange of Regional Cooperatives with the many established institutions and agencies serving schools and school personnel.

2. Problem solving with respect to issues that emerge around the organization and operation of Regional Cooperatives.

3. Long-range planning with respect to school improvement/staff development efforts, and the role of Regional Cooperatives within these efforts.

Network of Teacher Centers

1. Problem solving with respect to the role and interchange of Teacher Centers with established institutions, agencies and associations already serving school personnel.

2. Problem solving with respect to issues that emerge around the organization and operation of Teacher Centers.

3. Long-range planning with respect to the role of regional Teacher Centers in school improvement and the continued professional development of school personnel.

OECC 15-79

EXHIBIT D

REPORT OF THE TASK FORCE ON FUNDING CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL

To The

INTERAGENCY COUNCIL
FOR THE
CONTINUED PROFESSIONAL DEVELOPMENT
OF SCHOOL PERSONNEL

COPIES AVAILABLE FROM: OREGON EDUCATIONAL COORDINATING COMMISSION
495 STATE STREET
SALEM, OR 97310

JULY 1979

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TASK FORCE ON FUNDING
CONTINUED PROFESSIONAL DEVELOPMENT (CPD) OF
SCHOOL PERSONNEL

Introduction

In its report, Getting More From Our Schools, the study group on Continued Professional Development of School Personnel addressed the need for guidelines to be established for financing staff development activities for school personnel in the state. The study group's recommendation No. 5 called for these guidelines to be developed and named the implementing agency as the Oregon Educational Coordinating Commission, with the cooperation of the Board of Education and the Board of Higher Education. The results of this study were to be forwarded to the Inter-Agency Council for the Continued Professional Development, the study group's successor.

A Task Force on CPD Funding was formed in February, 1979, with the following members:

Dick Perry and Vern Rempel, Department of Higher Education
Don Kipp and Betty Fish, Department of Education
Bruce Clare, OEA
Terry Lindquist, COSA
Thelma Elliot, OSBA
Elinore Rogers and Clem Lausberg, OECC

The Funding Task Force held a series of five meetings over a three-month period and developed this report. As outlined in the charge to the Task Force, the task force examined both present methods of funding and alternative approaches. In view of the diverse interests represented and varying viewpoints, the task force decided not to endorse any specific funding option, but to pass along the alternatives for consideration by the Interagency Council, affected agencies, and other interested parties.

Charge to the Task Force

A. Describe Present Methods and Funding

1. Examine the present methods of funding professional development services to school personnel and present funding levels (see Study Group report as a point of departure).

2. Examine the costs associated with present service delivery methods, including the management structure for providing such service.

3. Examine the costs associated with present methods by type and purpose of professional development activities.

4. Examine the extent to which individuals, local school districts, colleges and universities, and other funding agencies presently share in the cost of professional development activities.

B. Develop Alternative Approaches

1. Collect information from other states on methods of funding of development services for school personnel.

2. Gather views and information from concerned individuals and groups in Oregon (e.g., teachers, administrators, local school boards, etc.).

3. Develop alternative approaches to the funding of professional development activities in Oregon under differing assumptions.

I. Present Funding for CPD Activities

Local School District Funding

Tuition reimbursement is provided to many Oregon school district personnel who take courses to satisfy certification requirements or school district educational requirements. In 1977-78, 152 of 213 school districts surveyed provided reimbursement for additional education for at least some personnel. The actual number of teachers receiving tuition support, and the level of the support, varies significantly among the districts. Only 20 of 36 districts with over 3,000 students provide tuition reimbursement, for example, as compared to 50 of 59 school districts with 100 to 500 students. Many districts put first priority on tuition reimbursement for personnel meeting certification requirements. Tuition reimbursement often is included in collective bargaining contracts.

Table 1
District Required Additional Education
Tuition Reimbursement

District Size	Ed. Required and Reimbursed		Ed. Not Required But Reimbursed		Total Reimbursed		Surveyed No. of Districts	Total Districts
	No.	Percent	No.	Percent	No.	Percent		
3000+	8	22%	12	33%	20	56%	36	37
1000-2999	23	42	19	34	42	76	55	59
500- 999	12	31	16	41	28	72	39	45
100- 499	31	52	19	32	50	85	59	96
Under 100	5	21	7	29	12	50	24	86
Total	79	37%	73	34%	152	71%	213	323

Source: 1977-78 COSA/OSBA Survey of Salaries, Economic Benefits and Selected Policies for Teachers in Oregon School Districts.
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It should be emphasized the number of teachers who take advantage of tuition waivers varies among districts, and with available dollars. For a representative number of districts contacted in a recent telephone survey, from 20 to 60 percent of teachers took advantage of tuition reimbursement, with the average reimbursement being $35 to $50 per credit hour, or a maximum yearly payment. Some examples are listed below: *

Table 2
Tuition Reimbursement
Selected School Districts - 1978-79*

3000+ ADM	Participating Teachers	Total Teachers	Percent Reimbursed	Payment Rate per Cr Hr	Maximum Payment per Year
Albany UH	50-60	240	20-25%	$51.67	$155
Forest Grove	108	216	50	-	120
McMinnville	46	190	24	36	111
Lake Oswego	132	357	37	42	126
Centennial	182	319	57	51	236
Beaverton	500	1200	42	39	156
1000-2999 ADM					
Astoria	45	120	38	Ave = $251 per year	
Crook Co.	45	150	30	33	389
Dayton	14	60	23	Ave = $80 per year	
Oakland	15	38	39	6 hours actual cost	

Source: Oregon School Boards Association
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*Additional information collected by the profession study group on the continued professional development of school personnel Getting More From Our Schools, is included in the Appendix, pp. 11-13.

School districts also provide inservice activities to educational personnel, including inservice days, special workshops, and district sponsored classes. Typically, school district inservice activities do not count toward meeting state certification requirements. Although there are a number of co-operative programs between higher education institutions and local school districts, most inservice activities are run independently of higher education certification programs, and are not subject to state reimbursement in the higher education budget.

Local school district inservice activities do not receive earmarked state aid in the Basic School Support formula. Like other local school district educational programs, however, they are presumed to receive a percentage (e.g. 40%) of costs through the Basic School Support formula. The actual percent of state support to a given school district will vary from 20 to 60 percent depending on the expenditure level, and whether the district qualifies for equalization aid.

A survey of 17 school district budgets in 1976-77[1] found an estimated one to five percent of school district budgets devoted to continued professional development activities. These figures include tuition reimbursement, personal leaves, supervisory time, salary costs for substitute teachers, travel costs, consultant time and other costs to the districts. Because such activities are not readily identified under the current accounting structure, the total identified estimates were based in part on interviews with local district administrators and teachers.

School districts are faced with a major task of providing inservice education for the education of handicapped children. Under state and federal mandates, classroom teachers need assistance in complying with IEP requirements, and assisting handicapped children in the regular classroom. Expenditures for inservice are not eligible for state reimbursement (i.e., 30 percent) as an approved excess special education cost. The districts, however, have received $100,000 in 1977-78 in federal project money. The future of this funding is uncertain, and as shown in the attached list, is distributed mainly to Education Service Districts in only a few geographical areas (see Table 14 in Appendix) .

Federal funds are also being used for inservice and advanced study for vocational education staff development. Approximately $600,000 is budgeted in 1980 for a wide variety of staff training (see Table 3), ranging from staff development centers at Portland and Eugene to evaluation of the vocational needs of disadvantaged and handicapped students. A large number of Oregon education personnel participate in these projects, including 3,000 at the Development Centers, 400 in the statewide inservice project, and 1,000 teachers in the Interinstitutional Consortium. Staff development is the highest priority for vocational education development under the Oregon State plan for vocational education.

Table 3
Staff Development Projects
Vocational Education 1980

Activity	Amount
Portland & Eugene Staff Development Centers	$240,179
Statewide Inservice Project	42,500
Basic OSU Support (Pre-service & Inservice)	130,000
Extern Program (Training for Experienced Teachers)	30,000
Interinstitutional Consortium	15,000
Health Ed. Teachers Staff Development	10,000
Disadvantaged & Handicapped - Evaluation	22,000
Student Leadership Program	109,000
Total	$599,027

Source:
OECC 6/79

Other federal funds are expended for inservice training and other staff development activities in a variety of federal titles and programs. These include Title IV-C of the Elementary and Secondary Education Act (ESEA), bilingual education project grants, and Title I (ESEA) for low income disadvantaged students.

Postsecondary Education Funding

Oregon's funding policy for graduate education varies significantly depending on whether the course is offered on campus during the regular three-term academic year, in summer session, or on an off-campus, self-support basis. Despite the wide variation in state support level, tuition charges are relatively comparable and approved graduate courses may count toward certification requirements in all three instances (see Table 4). No state support is provided for graduate students at independent colleges, and tuition is also higher than at public institutions.

Table 4
Illustration of Variation in State Support and Tuition Charges per FTE Student
Graduate Education Courses-1978-79

Type of Course	State Support per FTE Student	Student Tuition per FTE Student	State & Tuition Support
Regular Graduate Student	$3,100	$1,250	$4,350
Summer Session[a]	360	1,800	2,160
Self Support-Off Campus	0	1,800	1,800
Independent Colleges	0 Lewis & Clark	2,070	2,070
	Linfield	2,925	2,925
	U of Portland	3,150	3,150

[a]Summer Session General Fund support divided by FTE students
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Regular On Campus

During the regular three-term academic year, graduate students in education generate an appropriation level of approximately $4,350 per FTE student in 1978-79. Of that amount, $3,100 is state support and $1,250 tuition in the case of resident graduate students.

Graduate courses in education accounted for 23 percent of 500 level graduate enrollments in the fall of 1977, and 26 percent when non-education courses required for certification are included.

Expenditures for graduate teacher education, on the average, are less than the average for all graduate programs. In the fall of 1977, salary expenditures per credit hour in graduate courses in education (400G and 500 level) were about 82 percent of the average of graduate level courses in general. ($32 per credit hour as compared with $39 per credit hour). Salary costs per credit hours for graduate courses in education ranged from $25 at OCE to $57 at EOSC (see Table 5).

Table 5
Graduate Level Education (400G and 500 Level)
Credit Hours and Salary Cost per credit Hour - Fall 1977

Institution	Education Graduate Credit Hours	Education Salary Cost per Credit Hour	All Graduate Salary Cost per Credit Hour
U. of Oregon	11,960	$33	$40
Oregon State U.	3,203	44	40
Portland State U.	5,057	30	40
Oregon College of Ed.	4,070	25	29
SOSC	784	37	30
EOSC	182	57	51
Total	25,256	$32	$39

Source: Cost Load Studies, Department of Higher Education
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If it is assumed education expenditures for graduate teacher education are approximately 82 percent of all graduate courses, graduate teacher education expenditures are an estimated $6.4 million in 1978-79 and a projected $15.3 million for the 1979-81 biennium. As shown in Table 6, this estimate is also based on graduate teacher education students consisting of 26 percent of graduate student FTE.

Table 6
Estimated Graduate Teacher Education
Expenditures - 1978-81

	1978-79	1979-80	1980-81
Average Cost per FTE Student[a]	$3,582	$4,084	$4,401
Estimated FTE Students[b]	x 1,784	x 1,797	x 1,808
	$6.4 million	$7.3 million	$8.0 million
		1979-81 =	$15.3 million

[a]Estimated at 82 percent of average graduate education cost per FTE student (e.g., $3,582 of $4,368 per FTE student in 1978-79).
[b]Estimated 26 percent of all graduate FTE students are graduate teacher education students (e.g., 1,784 of 6,863 FTE students in 1978-79).

Source: Department of Higher Education, IEP and Cost Load Studies.
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Summer Session

State support of summer session is much less than during the regular school year. Nearly 75% of the summer session budget for 1978-79 was paid from student fees, or $4.2 million out of a budgeted $5.7 million. State support amounts to slightly under $8 per credit hour for the 191,306 credit hours offered in the summer, of which 100,738 were graduate level courses. The graduate tuition is generally $40 per credit hour among the State System institutions.

Records are not available for the summer program in the same detail as for the regular school year. Class sizes, however, tend to be much larger on the average for the summer programs (see Table 7). The TSPC has questioned the Chancellor's Office about some graduate classes that have exceeded 45 students, which could be a threat to the quality of instruction, according to TSPC.

Table 7
Summer 1978 Enrollments
and Average Class Size

Institution	Education Enrollments	Summer Graduate Average Class Size	Classes with 45 or more students
U. of Oregon	4104	27.0	23
OSU	2003	19.4	6
PSU	2603	18.0	-
OCE	2251	17.1	3
SOSC	1243	15.9	2
EOSC	112	9.3	-
Total	12,316	Average=19.5	34

Source: Department of Higher Education
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Self-Support Policy

Off-campus courses are not eligible for state support except in specific under-enrollment conditions in the state colleges and universities. The 1978-79 school year is the first year under institutional control of off-campus programming (in place of Division of Continuing Education). About 33,000 credit hours were generated. Figures currently are not available on the number of credit hours in education, but it was previously estimated at 60 percent under the Division of Continuing Education, which would be an estimated 20,000 credit hours of the 33,000.

Student charges per graduate credit hour are $40 for these courses when offered on an open enrollment basis, although some of the activity is done through contracts. Local school districts may arrange for the institution to provide graduate level instruction to educational personnel in the district, often with partial or full tuition paid for the students.

Off-campus courses must be funded within legislatively approved enrollment levels. No additional state funding for off-campus courses was approved by the 1979 Legislature, although a request was included in the Board of Higher Education budget. The Board of Higher Education does permit institutions below their legislatively approved enrollment to provide off-campus programs on an in load basis (with existing faculty). The institutions have a choice between funding legislatively approved enrollments either on campus or in off-campus locations. Beyond that level, institutions must either fund additional courses on a self-support basis or under contractual arrangements with local school districts without state funds.

Independent Colleges

The independent Colleges do not receive state support for graduate level classes taught to Oregon residents. Still, there has been a steady growth in education graduate degrees in the independent colleges. While tuition at the independent colleges is generally higher than in the public sector, the differential is less than for undergraduates. Over 320 master's degrees were awarded from independent colleges in 1976-77 as compared to 83 in 1969-70. The leading independent colleges in graduate level enrollment in education are Lewis and Clark, University of Portland, Linfield, and Pacific (See Table 8).

Table 8
Independent Colleges - Graduate Education
Degrees and Enrollment

Institution	Master's Degrees - 1977	Fall Enrollment - 1978
Lewis and Clark	225	228
University of Portland	73	109
Pacific	25	39
Linfield	9	21

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Private Providers of Inservice

A number of school districts have engaged private corporations and agencies in providing inservice for their educational personnel. The Oregon City School District, for example, has used one-day workshops or short term courses for teachers and administrators. A sample of providers offering programs in Oregon is listed below (see Table 9) of which some offer college credit courses.

Table 9

Corporation/Agency	Program	Cost
1) Learning Institute (Palo Alto, Cal.)	Workshops for Teachers	$45 - 1 day workshop $120 - 3 hour credit course
2) Education Consulting Associated (Denver)	One Day Workshop Summer Workshop	$45 - 1 day workshop
3) United Learning Institute (Tacoma, Wn.)	Personal Growth Short Courses	Not Available
4) Development Services Corp. (Bellevue)	Management Seminars	$65 per day
5) Reading Fo[illegible]tion of Californ[illegible] (Sacramento)	Re[illegible] - Course	$100 + additional [illegible]0 for 2 college credits

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II. Alternative Funding Approaches

Table 10 - Illustrative Guidelines For The Funding of Continued Professional Development Activities For School Personnel in Oregon

The Committee took no position on the alternative funding options, but presents them for review.

INTERESTS SERVED	FUNDING RESPONSIBILITY	CPD CATEGORY	EXISTING FUNDING ARRANGEMENTS	ALTERNATIVE OPTIONS (FOR DISCUSSION) *
Guidelines For Funding Inservice Studies				
1. District identified needs/ requirements	A shared responsibility between the local board, district administrators, and the district faculty	Inservice Days Staff Development (in district)	BSSF & Local Revenues BSSF & Local Revenues ESD - Resolution Services or Contract	• Earmark Amount in BSSF • Separate State Categorical Aid: Amount Per Staff Matched From State Funds Distributed to Dt. or ESD • General Increase (e.g. 50% in State BSSF) • Earmark Portion of Increases in Certification Fees for ESD Inservice
2. State identified needs/ requirements	A shared responsibility across all institutions and agencies in Oregon that support the schools; coordinating responsibilities need to be assigned to one agency.	First Aid Antidiscrimination Laws State Standards	BSSF & Local Revenues ESD - Resolution Services	
3. Federally identified needs/ requirements	Shared responsibilities between the federal government and all institutions and agencies in Oregon that support the schools: coordinating responsibilities need to be assigned to one agency.	PL 94-142 For Handicapped, Vocation Education, Others	General Federal Aid for Target Group Students Earmarked Federal Aid for Target Group Students State and Local Planning Funds.	• Matching State Categorical Aid • Permit Inservice to be Claimed as Special Education Excess Costs • Internship Program - No Recertification Requirements
4. Teacher identified needs/ requirements				
a, Collegial Exchange	Teachers themselves	Professional Development	Uniserve	• Federal Funding only
b. Teacher Centers	Federal Funds for Teacher Center		Teacher Centers - No State or Local Funds	• Matching State Funds
Guidelines for Funding Advanced Studies				
1. Studies leading to certificates required to maintain current job positions	The individual seeking the certificate and State assistance to higher educaton	Certification	State Support to Higher Educaton (3 term) DCE (Self support) Summer School - State Support (Individual Tuition or Partial District Reim-	• State Funding - Higher Education Off-Campus Courses • Local School District Inservice - Higher Educaton or TSPC • Teacher Licensure Exam

*See attached descriptions of major options

INTERESTS SERVED	FUNDING RESPONSIBILITY	CPD CATEGORY	EXISTING FUNDING ARRANGEMENTS	ALTERNATIVE OPTIONS (FOR DISCUSSION)
2. Studies leading to a new position				
a. Self-initiated	The individual seeking the certificate and State assistance to Higher Education	Certification Requirement	State Support to Higher Education (Individual Tuition or District Reimbursement)	• Higher Individual Share of Instructional Costs • Application of Federal Income Tax Rule - Higher Charge if New Position Sought
b. District-initiated	Shared responsibility between the district and the individual that is preparing for the new position			
3. Studies leading to enhancement of one's self as a professional, independent of certification	The individual engaging in advanced study		State Support to Higher Education (Individual Tuition)	• Self Support - No State Support

II. Alternative Funding Approaches

Table 10 provides illustrative guidelines for funding various types of study. The guidelines reflect the principle of "costs assumed according to interests served." The study group initiated the illustration and the task force has expanded it, including funding options.

The Funding Task Force took no position on the alternative funding options, but presents them for review.

Options for Funding Inservice Education

- Continue Existing Funding of Inservice - School districts would continue to budget funds for inservice activities from available state, local, and federal sources. Generally speaking, school districts are required to rank inservice needs against other competing demands for limited resources, although some federal project funds are earmarked for inservice activities. Increasing inservice demands have resulted from new state and federal mandates (e.g., Oregon State Standards for Schools, individualized education programs (IEPs) for the handicapped, etc.).

- Earmark Amount in Basic School Support - Within the total Basic School Support appropriation, earmark a specific amount for inservice education. The amount could be a percentage of the appropriation (e.g., 2, 3 percent) or a specific amount per teacher or per student. This approach would likely require administrative guidelines defining permissive inservice expenditures, as well as comparable record keeping to assure state funds were expended for the purpose intended. Historically, line items in the Basic School Support appropriation have been avoided in order to assure local management flexibility.

- State Categorical Aid - A separate appropriation for inservice education would have to compete with numerous other categorical aids, such as special education, talented and gifted, and child development specialists. A categorical aid program would have to define its purpose as to whether successful pilot programs were being funded for dissemination to other districts, or if the state were interested in picking up an ongoing share of excess costs. As discussed by the committee, local matching funds could be required from school districts or ESDs as a condition to state funding. An appropriation of $100 per teacher would amount to nearly $2.5 million per year for the 24,986 teachers statewide.

- General Increase in State Basic School Support - This approach would rely on general increases in the state percentage of school support (e.g., 50 percent) to give local school districts the necessary funding for inservice education. Inservice education would neither be earmarked in the state Basic School Support appropriation nor be the subject of a separate state categorical aid program. Districts would be expected to develop their inservice programs within the total state and local funds available, subject to the administrative standards of the Department of Education.

- Earmark Portion of Certification Fees for Inservice - The present certification fee for teacher licensure renewal would be increased, with the revenue earmarked for inservice education. Under several options discussed by the committee, a $25 fee increase would generate approximately $375,000 per biennium, and a $15 increase would provide $224,000 per biennium. These amounts could be matched by either state General Fund dollars or local district or ESD effort under this approach. Inservice education plans could be approved for eligibility at the state level under this approach, or left to local district discretion.

- Special Education Excess Costs - Inservice education costs to train teachers to comply with state and federal mandates for the handicapped are not eligible for 30 percent state reimbursement as "approved excess costs" for special education. This prohibition is in the administrative rules of the Department of Education rather than a statutory requirement, and is subject to amendment by the State Board of Education. Federal funds under PL94-142 are also excluded from "approved excess cost" claims, but may be used for inservice education purposes.

- Internship Program - Under this approach, by 1985, a one-year internship would be required of all elementary and secondary teachers prior to receiving certification. This program could be part of a redisigned four-year baccalaureate program, a five-year baccalaureate program, or could follow awarding of the bachelor's degree and be offered under the supervision of districts approved by TSPC. The required fifth year certification for secondary teachers would be eliminated. Continued professional development for teachers would be carried on through staff development programs of school districts and ESDs as part of the Board of Education's state standards for schools.

- Funding of Teacher Centers - A limited number of teaching centers are now funded by the federal government. Teacher centers can serve a variety of purposes, including inservice education, advanced studies and other exchanges with colleagues. Under this model for staff development, state and local funding could also be supplied to supplement a limited federal effort. Issues would have to be resolved, however, regarding membership and selection process to the governing boards, the relationship of the local school district, higher education institutions, and state agencies to the centers.

- Teacher Corps - In recent years, federally funded Teacher Corps projects have given emphasis to inservice education. Programs at the University of Oregon and Portland State University have cooperated with local school districts in developing inservice education programs. Oregon also participates in the National Council of the States on Inservice Education which is funded through Teacher Corps. There are expectations that future funding will be available for additional inservice activities.

- Uniserve Centers - Inservice education conducted by teacher organizations for member teachers is either paid for by individual teachers or professional organizations.

Options for Funding Advanced Studies

- State Funding - Higher Education Off-campus Courses - Under this approach, the higher education institutions would receive state funding for education courses in off-campus locations, such as local school districts or ESDs. The funding could be either as a separate earmarked amount or an increase in the total legislatively-approved enrollments. Currently, off-campus education courses must be funded within legislatively-approved enrollment levels. No additional state funding specifically for off-campus courses was approved by the 1979 Legislature, although a request was included in the Board of Higher Education budget.

- Local School District Staff Development - Local school districts or ESDs, in cooperation with higher education institutions, can set up inservice education programs which count toward teacher certification requirements. The actual number of such approved programs has been minimal in the past. Formal encouragement would be given to the higher education institutions and TSPC to expand these cooperative programs in the future, using both higher education faculty and employes of local school districts and ESDs.

- Teacher Licensure Exam - Teachers would be required to pass a competency exam for either entry into the profession or continued certification. Under this approach, certification requirements based on a specific number of graduate level hours would be replaced by successful performance on a uniform exam by subject or grade level. The main limitation under this option is the availability of adequate testing instruments, including the subjective judgments of teachers and peers about teaching effectiveness. Advanced study courses on university campuses would be voluntary rather than mandatory. Under this approach, it is possible that graduate credit hours in education courses could be reduced. An exam also might be used for teachers who wish to add subject areas to their existing certificates.

- Higher Individual Share of Instruction Costs - Based on the economic benefits and professional opportunities for educators who take advanced studies, higher tuition could be charged to graduate education students. Some would even advocate that graduate education courses be placed on a self-support basis. Under this model, graduate level education costs could be paid directly by the school district or individual teachers, with higher education placed in the same competitive positions as private providers of inservice education activities.

- Federal and State Income Tax Rule - Educational personnel can claim a federal and state income tax deduction for those advanced courses necessary to maintain skills in their existing position, but not for advancement to new responsibilities. This philosophy could be extended to the tuition charged to graduate education students, with higher tuition charges for those individuals seeking advancement to new positions. There would be obvious administrative problems in determining the motivations of individual students for fee purposes.

Table 11
DISTRICT EXPENDITURES FOR THE
CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL*

	Budget** Identified Dollars	Percent of Total Budget	Total** Identified Dollars	Percent of Total Budget	Dollars per Child
ADM above 20,000					
District A	$1,086,140	1%	$2,707,729	3%	$47
District B	323,696	1	1,536,219	4	76
District C	----	---	1,034,905	3	51
ADM between 7,000-14,000					
District D	----	---	890,133	4	67
District E	2,140	.01	595,753	4	83
District F	18,952	.1	395,733	3	41
ADM between 6,000-7,000					
District G	----	---	465,996	4	79
District H	----	---	161,790	2	24
District I	41,887	1	114,660	2	35
ADM between 1,500-3,000					
District J	----	---	211,562	5	85
District K	----	---	143,324	5	100
District L	----	---	85,915	2	33
District M	----	---	74,083	2	26
ADM between 500-1,000					
District N	----	---	119,707	6	111
District O	----	---	59,759	5	98
District P	300	.02	27,454	2	47
District Q	450	.02	20,633	1	21

* Based on interviews with superintendents or their designates in 17 school districts. Districts studied were selected on the basis of geographic location (all geographic areas of the state were represented) and size.

** Budget identified dollars are the monies earmarked in school budgets for staff development or "inservice" activities. Total identified dollars are the monies actually available within budgets for such activities, though not necessarily designated as such. They include salaries for the proportion of time principals or other administrative personnel spend in supervision or other staff development activities; monies to pay substitutes when teachers engage in staff or program development activities; monies to pay travel and tuition costs for teachers attending district required staff development activities; etc.

Source: Getting More from Our Schools, Profession Wide Study Group on the Continued Professional Development of School Personnel in Oregon, June 1978.

Table 12
Source Of Payment For CPD Activities Pursued
For Advanced Certification Or An Advanced Degree*

	N	Participants, in Form of Tuition or Fees	Own School District	Other, e.g., State Dept Prof Assoc	A Combination of Sources
Elementary Teachers					
Certificate	10	70%	60%	0%	30%
Degree	13	69	54	8	31
Jr/Sr High Teachers					
Certificate	15	67	47	0	13
Degree	3	67	33	0	0
Teachers of Exceptional Children					
Certificate	4	100	0	0	0
Degree	0	0	0	0	0
Other Specialists					
Certificate	22	77	23	9	23
Degree	9	78	44	11	22
Principals					
Certificate	17	59	53	24	35
Degree	8	75	25	0	50

* Some activities had more than one source of support, which accounts for the percentages shown adding up to more than 100.

Highlights

- The most common source of payment for CPD activities engaged in for purposes of an advanced certificate or an advanced degree is the participant involved. The percentage of participants paying for the CPD activities described ranged from 59 percent for principals to 100 percent for teachers of exceptional children.
- The participants' districts frequently paid for the cost of graduate work pursued, though generally speaking less than half the time.
- Arranging to have several sources share in paying for a particular CPD experience leading to an advanced certificate or an advanced degree is not uncommon.

Source: Getting More from Our Schools, Profession Wide Study Group on the Continued Professional Development of School Personnel in Oregon, June 1978.

Table 13
Source Of Payment For CPD Activities Pursued For Reasons Other Than Advanced Certificate And Advanced Degree

	N	Participants, in Form of Tuition or Fees	Own School District	State Dept of Education	Prof Assoc	Other Sources	A Combination of Sources
LEMENTARY TEACHERS							
Job Responsibility	28	21%	86%	7%	0%	4%	11%
New Job Desired	3	67	0	33	0	0	0
Prof Improvement	59	32	64	2	7	7	19
Other Reasons	7	43	43	14	0	14	14
R/SR HIGH TEACHERS							
Job Responsibility	23	4%	83%	0%	9%	4%	0%
New Job Desired	2	50	100	0	0	0	50
Prof Improvement	67	34	49	4	16	13	16
Other Reasons	17	24	53	0	24	6	6
EACHERS OF EXCEP-IONAL CHILDREN							
Job Responsibility	12	25%	50%	17%	0%	8%	0%
New Job Desired	2	0	0	50	0	50	0
Prof Improvement	22	27	45	27	0	5	5
Other Reasons	6	17	33	17	0	33	0
THER SPECIALISTS							
Job Responsibility	42	26%	67%	17%	5%	17%	33%
New Job Desired	7	71	43	14	14	14	43
Prof Improvement	115	34	38	11	11	17	21
Other Reasons	23	43	39	9	4	13	9
RINCIPALS							
Job Responsibility	71	3%	77%	11%	3%	7%	7%
New Job Desired	4	75	25	0	0	0	0
Prof Improvement	147	17	62	13	17	6	23
Other Reasons	16	6	75	6	0	6	6

urce: Getting More from Our Schools, Profession Wide Study Group on the Continued Professional Development of School Personnel in Oregon, June 1978.

Table 14

Inservice Projects Funded by SDE, 1978-1979

with Federal Funds under PL94-142 (Handicapped)

Coos E.S.D. - provide training and consultant follow-up for teachers and other school staff in the Coos County area ($9,256)

Hillsboro School District - develop a training program aimed at non-school education staff including teachers, teacher aides, playground aides, principals, and bus drivers; produce a set of videotapes and accompanying training materials ($4,000)

Jefferson E.S.D. - train regular classroom teachers in Crook, Jefferson, and neighboring counties in classroom management; train resource persons in each school to assist other teachers ($1,600)

Lane, Douglas, Jackson E.S.D.'s - work through regular staff meetings on the building level to identify county-wide needs and resources for implementing PL 94-142 and to match needs and resources where possible ($16,200)

Oregon College of Education - prepare teachers and administrators in central and eastern Oregon to evaluate and teach handicapped children ($18,500)

Portland State University - train administrators and counselors in the mid-Willamette Valley in understanding of and provision of services for the handicapped ($14,470)

U. of O. Health Sciences Center - provide training in the interdisciplinary team process for school district personnel in several locations around the state ($20,000)

Wasco E.S.D. - provide training to improve knowledge, attitudes, and skills of teachers, administrators, and support personnel in mid-Columbia region ($1,710)

OECC 3/23/79

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[1] Getting More from Our Schools, Profession Wide Study Group on the Continued Professional Development of School Personnel in Oregon, June 1978.

EPARTMENT OF EDUCATION
42 LANCASTER DRIVE NE.
ALEM, OREGON 97310

EXHIBIT E

OFFICE OF THE SUPERINTENDENT

November 28, 1978

MEMORANDUM NO. 16-1978-79

TO: ESD Superintendents

RE: A Request for a Proposal to Test the Feasibility of Oregon's Proposed Support System for Locally Sponsored Staff Development/School Improvement Activities

The new Minimum Standards that have been adopted for schools in Oregon, Public Law 94-142, and a host of other factors have highlighted the need for continuing staff development and program improvement activities on the part of schools. Both require resources and expertise that most districts are hard pressed to find.

For the past two years a profession-wide study group consisting of representatives from all institutions, agencies and professional associations in Oregon involved in schooling and the preparation of school personnel have been working toward the development of a profession-wide system of support for schools as they undertake staff development/school improvement efforts. Last spring the study group submitted a set of broad policy recommendations to the institutions and agencies represented on the study group that if adopted would establish a solid basis for thinking about the continued professional development of school personnel in Oregon (see "Getting More From Our Schools; Policy and Procedural Recommendations for the Continued Professional Development of School Personnel in Oregon"). These recommendations have now been acted upon by the institutions and agencies involved, and an INTERAGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL is in the process of being established. The RFP attached is a direct outgrowth of the work of the study group, and is one of the first project activities to be sponsored by the INTERAGENCY COUNCIL.

Late in May the State Department of Education, along with three other states received a federal grant to design the kind of support system for schools that has been called for in the recommendations of the profession-wide study group. Central to the proposed support system is the idea of pooling resources and expertise, in the form of "Educational Cooperatives" or "Educational Consortia," across districts, ESD's, institutions of higher education and educational R and D agencies. In this plan the State Department is to serve as a support agency to the various regional consortia, working primarily with and through the ESD's.

The RFP that is attached provides further information about these ideas, and outlines a procedure for testing their feasibility. To help districts and cooperating institutions prepare for the next set of requirements that flow from the new Standards, the feasibility test is to be designed around the program improvement requirement within the Standards (Standard 208, parts 2, 3 and 4). I hope you will consider responding to the request, and in this way help us find a way to make better use of increasingly limited resources to further the quality of schooling in Oregon. If you have questions, please call Dr. Betty Fish, at 378-3566.

Verne Duncan
State Superintendent of
Public Instruction

VAD/rjs
Attachments

REQUEST FOR A PROPOSAL

Testing the Feasibility of Oregon's Proposed Support System for Locally Sponsored Staff Development/School Improvement Activities

Purpose

To ask two regional groupings of education institutions and agencies to determine the feasibility of pooling resources and working cooperatively to assist local districts in staff development/school improvement efforts. The question of feasibility is to be studied from two points of view: (1) that of the institutions and agencies whose resources are to be pooled including local districts, and (2) that of local districts wanting to use the added resources available to them through the pool.

Participants

Each regional grouping is to consist, minimally, of two local districts, one ESD and one institution of higher education. Other institutions and agencies may be invited to join the Consortium as needed or desired, for example, additional LEA's or ESD's, or an educational R & D agency, but this is up to the organizing institutions involved. All who come together for purposes of the project, however, will be expected to work together as an "Educational Cooperative" or "Educational Consortium" for the duration of the project. Each Consortium will be expected to work closely with personnel from the Department of Education and members of the newly established INTERAGENCY COUNCIL FOR THE CONTINUED PROFESSIONAL DEVELOPMENT OF SCHOOL PERSONNEL. The Teaching Research Division of the State System of Higher Education, upon request, will be able to provide some staff assistance to each Consortium.

Central to the proposed support system for local districts is the concept of Education Extension Centers. As presently conceived each ESD would establish such a Center within its own organizational structure, and would assign the Center responsibility for supporting local districts in staff development/school improvement efforts. Funds to operate the Center, at least initially, would come from the ESD. The plan also calls for a statewide network of Centers to be formed as an organizational structure through which the State Department, ESD's and local districts would communicate and share resources.

Work to be Accomplished

Each of two local districts within each Consortium (a) prepare a staff development/school improvement (SD/SI) plan that meets an identified learning need of students within their respective districts (where need is defined as a learning outcome that is desired but not being achieved); (b) identify the functions to be performed in implementing each plan by the various members of the Consortium; and (c) estimate the costs that would be incurred by each member of the Consortium in implementing each plan. NOTE: Each of the SD/SI plans is to cover a 9 to

12 month period of time (the summer months may be used), and each is to include provisions for determining short-term effects (effects during the year of implementation) and long-term effects (effects over one to three years after implementation). Teachers and administrators from the buildings in which SD/SI plans are to be implemented must be involved in preparing the plan and assessing the feasibility of its implementation.

On the basis of these planning exercises, representatives from each institution in the Consortium are to describe (a) the procedures followed in developing each SD/SI plan and its accompanying cost estimates; (b) the contribution which each participating institution was able to make in developing each plan; (c) the contribution each participating institution was able to make toward implementing each plan; and (d) the problems/limitations encountered either in designing the SD/SI plan or in thinking through its implementation.

After completing these statements each participating institution is to prepare a brief statement describing from its own point of view the feasibility of engaging in such an approach to staff development/school improvement efforts on a continuing and expanded basis. This feasibility statement is to take into account all aspects of the planning exercise, including actual and projected costs, and is to include recommendations as to how the proposed SD/SI support system for schools in Oregon might be improved or made more practical.

Timelines

Proposal to be submitted to the State Department of Education by Friday, December 22, 1978. It is anticipated that at least two proposals will be funded. Notification of Department decisions on proposals will be provided by Friday, January 5, 1979. A progress report (oral) will be made by representatives from each Consortium at a one-day meeting called by the State Department in mid-February. A final report (written) is to be filed with the State Department by April 15.

Funding

Two thousand five hundred dollars to each Consortium, with $500 payable on February 10 and March 10, and $1,500 payable on acceptance of the final report.

Proposal Format and Preparation

The proposal should address the following points, though not necessarily in the order listed:

- Participants in the Consortium submitting the proposal;
- The two local districts who will identify the instructional program in need of improvement, and prepare an appropriate staff development/program improvement plan;

- The identified student need around which the SD/SI effort is likely to be undertaken, and the source of evidence used in identifying the need;
- A first approximation to the procedures to be followed in designing the SD/SI plan;
- Designation of a project director or coordinator;
- Designation of a fiscal agent.

The proposal should not exceed two or three pages in length.

Proposal Submission

The proposal should be delivered to Dr. Betty Fish, Center for Program Coordination, State Department of Education by no later than 3:00 p.m., Friday, December 22. The proposal should be submitted by the institution serving as fiscal agent for the project.